

# Set Up and Manage Salesforce Communities

Salesforce, Spring '17





# CONTENTS

Set Up and Manage Salesforce Communities	1
Salesforce Communities Overview	2
Plan Your Implementation	4
Prerequisites	4
How Communities Uses Lightning	5
Supported Browsers for Communities	7
Access Communities in Salesforce1	8
Salesforce1 Settings for Communities	10
Setting Up a Community	10
Enable Salesforce Communities	
Manage Your Community with Community Workspaces	13
Access Community Workspaces	15
Update Org-Wide Community Settings	16
Community Setup Basics	24
Customize Login, Self-Registration, and Password Management for Your Community .	62
Enable Other Salesforce Features in Communities	7
Community Security and Authentication	93
Authenticate Community Users	94
Encrypt Community Data	98
Plan Your Community Design Strategy	98
Choosing Between Community Builder and Force.com Sites	99
Override Default Pages in Your Community with Custom Pages	. 103
Use a Custom Page for Service Unavailability	. 103
Add Custom Pages That Don't Require Login	. 106
Which Community Template Should I Use?	. 107
Compare Features Available in the Community Templates	. 108
Objects Supported by Out-of-the-Box Components and Pages in Community	
Templates	. 109
Customer Service (Napili) Template—Community Setup Checklist	111
Which Components Can I Use with Each Template?	113
Customize Communities with Community Builder	. 227
Community Builder Overview	. 227
Manage Your Community's Pages and Their Properties in Community Builder	. 235
Share More Salesforce Object Data in Your Community	. 262
Track Community Users with Your Google Analytics Tracking ID	. 269
Lightning Bolt Solutions: Build Once, Then Distribute and Reuse	. 27
Export and Packaging Considerations for Lightning Bolt Solutions	. 273
Export and Package Customized Lightning Bolt Solutions	. 275
Export and Package Customized Lightning Bolt Pages	. 277

## Contents

Community Management	279
Community Managers, Moderators, and Admins Working Together	280
Measure Community Success with Dashboards	287
Insights for Community Engagement	292
Community Moderation Strategies and Tools	300
Organize Communities with Topics	321
Customize Recommendations in Communities	329
Reputation Overview	331
Community Reporting	337
Report on Communities with the AppExchange Packages for Community	
Management	38
Set Up Report Management for External Users—Create and Edit Reports	396
Track Community Activity with Custom Reports	397
Google Analytics $^{TM}$ for Salesforce Communities Package	399
Manage Partner Relationships in Communities	411
Enable Partner Functionality in Your Org	411
Migrate from a Partner Portal to a Community	412
Prep Your Org for a Partner Community	413
Create a Partner Community with the Lightning Partner Management Solution $\dots$ 4	122
Educate Your Users About Communities	124
Access Your Communities from Salesforce	125
Share Personal Contact Information Within Communities	125
Search Behavior in Communities	128
Manage Your Community Email Notifications	129
Who Can See What in Communities	130
Index	140
	1 TU

# SET UP AND MANAGE SALESFORCE COMMUNITIES

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

#### You can use Communities to:

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

Communities can be based on standard Salesforce functionality and tabs, or on one of our preconfigured templates. Communities can be used to share a subset of features and data from your internal Salesforce org. Communities can also be customized to use your company branding.

# EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

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.

## IN THIS SECTION:

#### Salesforce Communities Overview

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. Use easy point-and-click branding tools with Lightning templates or go with the Visualforce to create branded collaboration spaces.

## 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.

## Setting Up a Community

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

## Community Security and Authentication

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

## Plan Your Community Design Strategy

## 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.

## Customize Communities with Community Builder

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

## 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.

## Community Management

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

## **Community Reporting**

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

## **Educate Your Users About Communities**

Tell community members what to expect from their community experience.

#### SEE ALSO:

Plan Your Implementation

**Enable Salesforce Communities** 

**Create Communities** 

Manage Your Community

# Salesforce Communities Overview

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. Use easy point-and-click branding tools with Lightning templates or go with the Visualforce to create branded collaboration spaces.

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

# **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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



Communities can be based on standard Salesforce functionality and tabs, or on one of our preconfigured templates. Communities can be used to share a subset of features and data from your internal Salesforce org. Communities can also be customized to use your company branding.

## **Learn About Communities**

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

- Community Basics
- Community Rollout Strategy

# Create, Design, and Manage Communities

- Set Up and Manage Communities (PDF)
- Use Templates to Build Communities (PDF)
- Community Managers Guide (PDF)
- Report on Communities with the AppExchange Packages for Community Management
- Google Analytics<sup>™</sup> for Salesforce Communities Package
- SEO Best Practices
- Create Partner Communities (PDF)

# 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

# Going From Portals to Communities

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

# Stuck? Ask for Help in a Success Community

- Community Cloud
- Community Implementation
- Community Management

## IN THIS SECTION:

#### Plan Your Implementation

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

## Prerequisites

## How Communities Uses Lightning

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

## **Supported Browsers for Communities**

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

# 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.

# **Prerequisites**

Before you enable Communities:

- Ensure that your organization has Communities licenses. From Setup, enter *Company Information* in the Quick Find box, then select **Company Information**. Your licenses are listed near the bottom of the page.
- Enable the global header for employees or internal users in your organization that you plan to add as members of your community.

  The global header lets you easily switch back and forth between your internal organization and your community. Note that the

global header introduces some navigation and look-and-feel changes that will be unfamiliar to your users, so plan to alert them ahead of time.



# How Communities Uses Lightning

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

## What is Salesforce Lightning?

Lightning includes the Lightning Component Framework and some exciting tools for developers. Lightning makes it easier to build responsive applications for any device.

Lightning includes these technologies:

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

Some Salesforce products built with underlying Salesforce Lightning technology include:

- Lightning Experience
- Salesforce1
- The Koa, Kokua, Customer Service (Napili), and Aloha community templates
- Lightning Bolt solutions

## What is Lightning Experience?

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

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

Lightning in the context of communities means the use of Lightning components to build communities. This is done through out-of-the-box templates, like Customer Service (Napili), or Lightning Bolt solutions.

#### How is Lightning used in communities?

Lightning Bolt solutions and community templates use the same *underlying* technology as Lightning Experience—namely, the Lightning platform and Lightning components—but you aren't required to enable Lightning Experience to use them.

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

# **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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



**Note:** Although Communities settings are available in Lightning Experience Setup, Communities isn't fully supported in Lightning Experience because the global header isn't available. The global header is what internal users use to switch between their Salesforce org and communities. Without the global header, internal users need to bookmark community URLs to access communities they're members of.

If you enable Lightning Experience in your org, internal users must switch back to Salesforce Classic to access the global header.

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

## Do I need to turn on Lightning Experience in my internal org to use Lightning-based template communities?

No! Koa, Kokua, Customer Service (Napili), and Aloha use the same underlying technology as Lightning Experience, but are independent of one another.

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

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

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

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

Yes! See Configure Components for Communities for more information.

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

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

If you want a community with the Lightning look and feel, you'll need to create a new community with a community template that uses Lightning technology.

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

Switch to Salesforce Classic for the following functionality:

- The global header
- Creating and disabling partner accounts and users
- Creating and disabling customer accounts and users
- Logging in as a community user
- Using delegated administration



# **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 and Lightning Experience

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

# 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	✓	✓			<b>✓</b>
Microsoft® Windows® Desktop		✓	✓	<b>✓</b>	<b>✓</b>

## **On Mobile Devices**

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

Note: Community Workspaces is only supported by browsers that support Lightning Experience.

# **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.

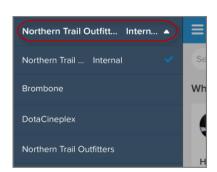
# **Grant the Necessary Permissions**

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.
- 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	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.

## **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

Type of User	Salesforce1 Mobile Browser App	Salesforce1 Downloadable App for iOS Devices	Salesforce1 Downloadable App for Android Devices
	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
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 Salesforce 1, we don't load communities built on the Koa, Kokua, or Customer Service (Napili) templates in the Salesforce 1 apps. These communities are responsive and it's best to access them directly from a supported mobile browser using the community URL.

# Community Management, Community Workspaces, and Community Builder

Community Management and Community Workspaces aren't available in Salesforce 1. We recommend that you use the supported browsers on desktop computers to make customizations in Community Management, Community Workspaces, and Community Builder.

#### IN THIS SECTION:

## 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.

# 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:

"Customize Application"

# Setting Up a Community

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

## IN THIS SECTION:

#### **Enable Salesforce Communities**

Enabling Salesforce Communities is the first step to creating communities.

## Manage Your Community with Community Workspaces

Community Workspaces is your one-stop shop for building, setting up, and monitoring your

community. You can access the Community Builder and Administration workspaces to manage your community's setup and branding. Community managers can view dashboards 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.

## **Access Community Workspaces**

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

## **Update Org-Wide Community Settings**

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

#### Community Setup Basics

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

# **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

## Customize Login, Self-Registration, and Password Management for 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.

# **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.



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 to the Preview status.

- 1. From Setup, enter *Communities Settings* in the Quick Find/Search 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.

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

You can designate a completely custom domain by entering it in on the Domain Management page. From Setup, enter *Domains* in the Quick Find/Search 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. The global header isn't supported in Lightning Experience, so to create, manage, or access communities from the Global Header, switch back to Salesforce Classic. If your org is using Lightning Experience, users with the appropriate permissions must switch to Salesforce Classic to access the global header.



## **EDITIONS**

Salesforce Communities available in: Salesforce Classic

Salesforce Communities Setup available in: Salesforce Classic and Lightning Experience

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

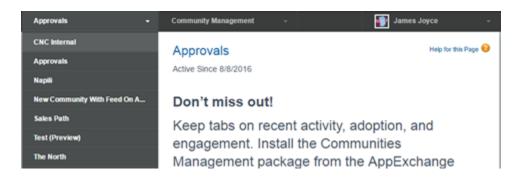
# **USER PERMISSIONS**

To enable Communities:

"Customize Application"

ventering it in on the Domain Management page. From Setup, enter *Doma i n.s.* 

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:

Who Can See What in Communities

# Manage Your Community with Community Workspaces

Community Workspaces is your one-stop shop for building, setting up, and monitoring your community. You can access the Community Builder and Administration workspaces to manage your community's setup and branding. Community managers can view dashboards 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.



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

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



**Important:** The options available in Community Workspaces are based on your community template selection 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 select **Show all settings in Community Workspaces**.

Community Workspaces includes the following workspaces:

## Builder

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

## Moderation

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



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

## **Content Targeting**

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

#### **Dashboards**

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

#### Administration

From the Administration workspace, you can update basic setup for the community, including:

- Members—Add or remove members by profiles.
- Tabs—Select the tabs you want members to see in communities built using the Salesforce Tabs + Visualforce template.
- Branding—Select an out-of-box branding theme for communities built using the Salesforce Tabs + Visualforce template.
- Login & Registration—Select the default community login and self-registration pages, or manage custom pages.

## **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

## **USER PERMISSIONS**

To access Community Workspaces or Community Management:

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

To access moderation rules and criteria:

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

To customize administration settings or use Community Builder:

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

- Emails—Customize sender information, 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 pages
- Preferences—Enable other features such as content flagging, nickname display, direct messages, 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.
- Reputation on page 334—Set up reputation levels and points to reward members for activity in the community feed.
- (1) Important: If you're an administrator and accidentally remove yourself from a community, you can't access the Administration settings in Community Workspaces. To add yourself back to the community or make other membership updates, use the API.

# **Access Community Workspaces**

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

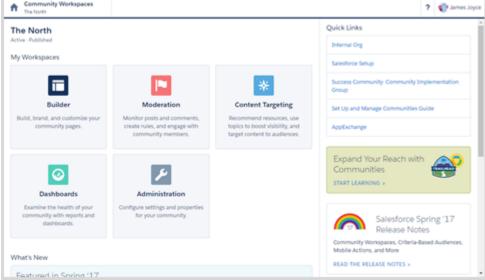
- From Setup, enter Communities Settings in the Quick Find box, then click Communities Settings.
- 2. Enable Community Workspaces under Community Management Settings. Click Save.
- **3.** From Setup, enter *All Communities* in the Quick Find box, then click **All Communities**. To access a community's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

# **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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





USER PERMISSIONS

access Community rkspaces or Community nagement:

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

AND is a member of the community

access moderation rules discriteria:

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

AND is a member of the community

To customize administration settings or use Community Builder:

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

# **Update Org-Wide Community Settings**

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

## IN THIS SECTION:

## Set the Default Number of Community Roles

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

## **Set Custom Community Roles**

Community members are typically assigned the role of partner, customer, or employee. However,

you can create custom roles that replace standard ones. You can also choose to display the member's company name in place of a role.

#### **Enable Super User Access for Your Communities**

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

## **Enable Report Options for External Users**

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

# 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.



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

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

#### SEE ALSO:

**Enable Super User Access for Your Communities** 

# **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

# EDITIONS

Salesforce Communities available in: Salesforce Classic

Salesforce Communities Setup available in: Salesforce Classic and Lightning Experience

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

## **USER PERMISSIONS**

To set the number of default roles:

"Customize Application"

# Set Custom Community Roles

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

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

To create custom roles for communities:

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

## **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

# **Enable Super User Access for Your Communities**

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

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

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

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

Next, assign super user access to individual users.

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

## **EDITIONS**

Salesforce Communities available in: Salesforce Classic

Salesforce Communities Setup available in: Salesforce Classic and Lightning Experience

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

## **USER PERMISSIONS**

To enable Super User Access:

"Customize Application"

## IN THIS SECTION:

Grant Super User Access to Customer Users in Your Community

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

## SEE ALSO:

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

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

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.

## SEE ALSO:

Enable Super User Access for Your Communities Grant Super User Access to a Partner User

# **Enable Report Options for External Users**

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

- 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**

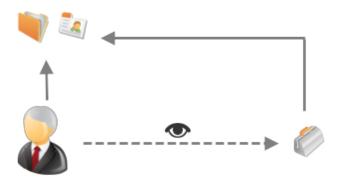
Grant portal or community users access to records that are associated with their accounts or contacts using sharing sets, based on their user profiles.

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:

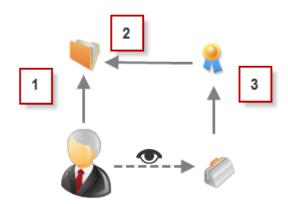
- Grant users access to all cases related to their account or contact record.
- Grant users access to all cases related to a parent account or contact that is identified on the user's account or contact record.

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 and Lightning Experience

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

- 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:

"Customize Application"

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 and Lightning Experience

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

## **USER PERMISSIONS**

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

"Customize Application"

# **Community Setup Basics**

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

## IN THIS SECTION:

## **Customize Communities**

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

## **Brand Your Community**

If you are using the Salesforce Tabs + Visualforce template, you can customize the look and feel of your community in Community Workspaces or 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.

#### **Enable the Global Header for Communities**

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

## Share a Link to Your Community

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

## **Update Your Community Settings**

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

#### Deactivate a Community

#### **Enable Optional Community Features**

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

## Set Up Search Engine Optimization (SEO) for Your Community

Have search engines, such as  $Google^{™}$  or  $Bing^{\~}$ , index your community so that customers, partners, and guest users can easily discover community pages via online searches. SEO can significantly improve discovery for public communities.

# **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

## **Create Communities Users**

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

Available in: Salesforce Classic

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

A few things to bear in mind about creating users:

- When you enable a contact record as an external user, you can assign a Partner Community, Customer Community, or Customer Community Plus license to them, depending on your business relationship.
- Only business accounts (and not person accounts) can be partner accounts, and you can use only partner accounts to create partne
- r users.
- 1. On the account record, view or add the contact record for the person you want to add to a community.
- On the contact detail page, click Manage External User, then Enable Partner User or Enable Customer User.

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

Note: If you don't see the Enable Partner User or Enable Customer User buttons, ask your administrator to check whether they're included in the Contact page layout. If the buttons are included, ensure that your org has customer or partner community licenses available.

## **USER PERMISSIONS**

To create partner users:

"Manage External Users"

To create customer users:

"Manage External Users"
 OR

"Edit Self-Service Users"



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

To log in as an external user:

"Manage Users"

AND

"Edit" on Accounts

- **3.** Edit the user record for this external user and assign the appropriate user license: Partner Community for partners and Customer Community or Customer Community Plus for customer users.
- **4.** Select the appropriate profile and role for the partner or customer user.
  - Note: Make sure that you choose a profile that has the appropriate tabs exposed. Also, each customer or partner account has a role hierarchy associated with it. All customer and partner user roles roll up to the account owner.
- 5. If you haven't yet activated the community you want to add the external user to, deselect **Generate new password and notify user immediately** so that users don't receive a password before the community is activated.
  - If you opt to notify the user immediately but the user is not a member of any active community, Salesforce doesn't send the email.
  - You can send a welcome email with the login information by selecting the **Send welcome email** option when you activate a community.
  - If you don't send a welcome email when you activate the community, you must manually send this information to the user.

## 6. Click Save.

• Customer or partner users can't directly log in to Salesforce; they must use a community to access your Salesforce data. To add a customer or partner user to a community, add their user profiles to a community.

- Customer Users don't see the Notes & Attachments related list on accounts or contacts.
- Creating an external user with a Customer Community Plus license is similar to creating a partner user. On the contact record, select
   Manage External User, then Enable Partner User. Also, when editing the user record, select the Partner Community User profile
   or a profile cloned from it.
- To troubleshoot issues or ensure that the community is configured appropriately, on the contact detail page, click Manage External
  User and 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 a community in preview, the user doesn't see the drop-down menu when in the
  preview community.
- 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.
- 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

Partner User Roles

Customize Email Sent from Communities

## **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.

- To start creating communities, from Setup, enter Communities in the Quick Find box, select All Communities, then click New Community.
   The Community Creation wizard appears, with different out-of-the-box template options for you to choose from. If you have Lightning Bolt solutions available in your org, you see them in the wizard as well.
- 2. To see more information about a template, select it.

#### Customer 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 a flexible configuration. Requires developer experience and

# **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

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 show its subcategories as children.

## **Company Name**

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

- **6.** Enter a community name.
  - Note: If you're creating multiple communities, keep in mind that community names 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 changing it.

## 8. Click Create.

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

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



(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:

Set Up and Manage Salesforce Communities

**Customize Communities** 

How many communities can my org 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 org have?

You can have up to 100 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 100.

## SEE ALSO:

**Create Communities** 

# **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

## 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 available Lightning Bolt solutions 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 a 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.

## **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

## **USER PERMISSIONS**

To create, customize, or publish a community:

 Create and Set Up Communities

To create article types and article actions:

 "Manage Salesforce Knowledge"

To create data categories:

"Manage Data Categories"

#### 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.

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 the Salesforce Help.

## 7. Click Create.

The community is created in preview status. Now you're ready to build and customize, or manage and moderate your community.

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 and Their Properties 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 Workspaces or 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.** Open Community Workspaces or Community Management.
- **2.** Click Administration, then select the part of the community you want to customize:
  - Important: The options available in Community Management or Community Workspaces are based on your community template selection, permissions, and preferences. For example, if your community 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 Administration > Preferences and enable Show all settings in Community Management or Show all settings in Community Workspaces.
  - Members
  - Tabs
  - Branding
  - Login & Registration
  - Emails
  - Pages
  - Preferences
  - Settings
- **3.** To share the community with stakeholders while it's still in Preview status, copy the URL displayed on the **Administration** > **Settings** page and share it.

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

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

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

## **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

## **USER PERMISSIONS**

To access Community Workspaces or Community Management:

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

To access moderation rules and criteria:

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

To customize administration settings or use Community Builder:

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

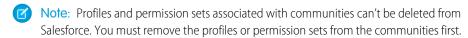
# Add Members to Your Community

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. Open Community Workspaces or Community Management.
- 2. Click Administration > Members.
- **3.** To add members using profiles:
  - 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 or Community Workspaces. To add yourself back to the community or make other membership updates, use the API.
- **4.** To add members using permission sets:
  - **a.** To search for a specific permission set, enter a search term and click **Find**.
  - **b.** Select the permission sets you want to allow access to your community. Press CTRL to select multiple permission sets.
  - c. Click Add.

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

5. Click Save.

## **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

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, Self-Registration, and Password Management for Your Community.

SEE ALSO:

Customize Communities

Enable the Global Header for Communities

## Determine User Visibility in Your Community

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

User sharing for external users is turned on by default when you enable Communities. This setting applies to all communities in your organization.

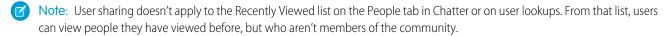
The default setting allows an external user to see other external users under the same account and users in common communities. You can change the organization-wide default for Users to make your communities more restrictive or open, depending on your use case.

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

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

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

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



To view or change user sharing settings:

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

For more information, on user sharing see the following topics in the Salesforce online help.

- Understanding User Sharing
- Controlling Who Community or Portal Users Can See

## Reset An External User's Password for Communities

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

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

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

SEE ALSO:

Create Communities Users

How do external community members get login information?

## How do external community members get login information?

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

When you enable a contact as a customer user or partner user, they don't receive their login credentials until you add them to a community with welcome emails enabled. If welcome emails are disabled for the community, the external user won't receive credentials and you must manually send them. To do so, from Setup, enter <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 and Lightning Experience

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

SEE ALSO:

Create Communities Users

Reset An External User's Password for Communities

## How do I update community membership using the API?

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

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

1. Get the networkId for your community.

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

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

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

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

- 3. Create a .csv file with columns for networkId and parentId. For parentId, list the profileId or permission setId 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 36.

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. Open Community Workspaces or Community Management.
- 2. Click Administration > Tabs.

Tip: If you're using one of the preconfigured templates instead of Salesforce Tabs + Visualforce, the **Tabs** page is hidden by default. To display the page, click **Administration > Preferences**, then select **Show all settings in Community Management** or Show all settings in Community Workspaces.

- 3. Select the tabs to include in your community from the Available Tabs list. 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.

## **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

## **USER PERMISSIONS**

To create, customize, or activate a community:

"Create and Set Up Communities"

AND

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.

(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.

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

## **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

## **USER PERMISSIONS**

To rename the Chatter tab:

"Customize Application"
 OR

"View Setup and Configuration"

AND

Be designated as a translator

# **Brand Your Community**

If you are using the Salesforce Tabs + Visualforce template, you can customize the look and feel of your community in Community Workspaces or 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. Open Community Workspaces or Community Management.
- 2. Click Administration > Branding.
- **3.** Use the lookups to choose a header and footer for the community.

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

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

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.

**EDITIONS** 

Available in: Salesforce Classic and Lightning Experience

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

Note that some of the selected colors impact your community login page and how your community looks in Salesforce1 as well.

<b>Color Choice</b>	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.** Open Community Workspaces or Community Management.
- 2. Click Administration > Emails.
- **3.** Enter custom values for the email sender's name and address to replace the default values.
  - Note: If you change the sender's email address, we send a verification email to the new address. The change is pending, and we continue to use the existing address while we await verification. The requested address doesn't take effect until you click the confirmation link in the email. If verification is already pending for a new email address and you specify a different new address, we retain the latest value and use that for verification.

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

- **4.** Customize what displays in the footer of Chatter emails.
  - [] 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.

## **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

## **USER PERMISSIONS**

To create, customize, or activate a community:

"Create and Set Up Communities"

AND

- **6.** Use the default email templates or use the lookups to select different templates for welcome emails to new community members, forgotten password emails, and notification emails about reset passwords. If your organization uses email templates to submit case comments, you can select a template (none is provided by default).
  - User-initiated password reset links expire in 24 hours. Administrator-initiated password reset links don't expire. You can customize any default template.
  - Note: If you customize the contents of an email template, we recommend that you use the {!Community\_Url} merge field. This custom merge field populates the unique URL for a community, ensuring that emails to users contain URLs with the correct parameters and direct users to the appropriate community to log in or change a password.

#### 7. Click Save.

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

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

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

## SEE ALSO:

Merge Fields for Communities
Customize Communities

## Merge Fields for Communities

You can add merge fields to Communities email templates.

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

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

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

# EDITIONS

Available in: Salesforce Classic and Lightning Experience

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:
	<ul> <li>The template containing this field is selected as the Welcome New Member template for a community, and Send welcome email is selected, OR</li> </ul>
	<ul> <li>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.</li> </ul>
{!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
\$Network.Name	The name of the community, as entered during community creation.
\$Network.NetworkUrlForUserEmails	The URL to the login page of a community. For instance, https://acme.force.com/partners/login.
	If this merge field is part of the welcome email being sent to a new external user, the URL is appended with a link to a reset password page.

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

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 the Global Header for Communities**

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

Available in: Salesforce Classic

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

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

Important: The Global Header is visible only in Salesforce orgs using Salesforce Classic. Salesforce orgs using Lightning Experience can't use the Global Header.



## **USER PERMISSIONS**

To create permission sets:

 "Manage Profiles and Permission Sets"

To assign a permission set to a user:

"Assign Permission Sets"

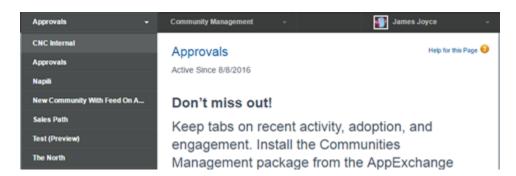
The View Global Header permission is disabled by default for all standard profiles. To view the global header, users must be assigned the "View Global Header" permission either by selecting it on standard profiles, creating custom profiles, or by creating a permission set. Create permission sets to easily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

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

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

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

- (1) Important: The global header isn't supported in Lightning Experience, so to create, manage, or access communities from the Global Header, switch back to Salesforce Classic. If your org is using Lightning Experience, users with the appropriate permissions must switch to Salesforce Classic to access the global header.
- When in a Salesforce Tabs + Visualforce community, users with either the Manage Communities or the Create and Set Up Communities permission see a gear icon ( ) they can use to switch to Community Workspaces or Community Management.
  - Note: Within Community Workspaces or Community Management, users see the global header and the Community Management menu, even if they don't have the "View Global Header" permission. However, we recommend that you still assign the "View Global Header" permission to users who need to switch between your internal org and communities.



• When in a Lightning community, users with either the Manage Communities or the Create and Set Up Communities permission can switch to Community Workspaces or Community Management by clicking on their name.

#### SEE ALSO:

Access Your Communities from Salesforce

# Share a Link to Your Community

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

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

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

- 1. Open Community Workspaces or Community Management.
- 2. Click Administration > Settings.
- **3.** Copy the URL displayed on the page and share it with your stakeholders. Keep in mind that you can only share the URL with users who you added as members of the community.

SEE ALSO:

Customize Communities
Communities Statuses

# **Activate Your Community**

Activate your community to make it accessible to community members. The 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<sup>™</sup>, a search engine optimization service. To make the community URL active and enable login access for community members, publish the community.
- 1. Open Community Workspaces or Community Management.
- 2. Click Administration > Settings.
- 3. Click Activate Community.

SEE ALSO:

Communities Statuses
Customize Communities
Deactivate a Community

## **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

## **USER PERMISSIONS**

To share a preview URL for your community:

 "Create and Set Up Communities"

## **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

## **USER PERMISSIONS**

To create, customize, or activate a community:

 "Create and Set Up Communities"

AND

## 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. If you're using Community Workspaces, the link for sharing a Preview community is located under Administration.

No welcome emails are sent even if Send welcome email is selected.



**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 to the 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

## **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

# **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 changing it.

- 1. Open Community Workspaces or Community Management.
- 2. Click Administration > Settings.
- **3.** Edit your community settings as needed:
  - Edit your community name, description, and URL, by clicking 🔌 next to your community name.
  - Manage the status of your community.
  - Change your community template.

#### SEE ALSO:

Change Your Community Template
Communities Statuses

# Deactivate a Community

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

- Add or remove members
- Add, remove, or change the order of tabs
- Change the color scheme
- Change the community URL
- 1. Open Community Workspaces or Community Management.
- 2. Click Administration > Settings.
- 3. Click Deactivate.

Your community is inactive and offline.

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

#### SEE ALSO:

Communities Statuses
Activate Your Community
Customize Communities

## **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

## **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

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

## EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

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.

# 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.

# Avai

**EDITIONS** 

Classic and Lightning Experience

Available in: **Enterprise**,

Available in: Salesforce

Performance, Unlimited, and Developer Editions

- Changing the community template updates the navigation options in Community Workspaces or Community Management. To
  view all available navigation options regardless of template selection, select AdministrationPreferences > Show all settings in
  Community Workspaces or Community Management.
- Your community URL changes when switching from a Salesforce Tabs + Visualforce template to any other template type. Specifically, /s is appended to the community URL. Be sure to update any links to your community with the updated URL.

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

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*.

# **Enable Optional Community Features**

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

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

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

#### General

- Display nicknames instead of full names in your community. Enabling nickname display
  in your community allows more privacy and protects member identities. This 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 community members to have secure private
  conversations with other Chatter users. To expose Chatter messages for external users,
  administrators must also enable the Chatter tab in communities using the Salesforce
  Tabs + Visualforce template.

## **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

- Enable direct messages, which allows community members to have secure private conversations in communities built using the Customer Service (Napili) template.
- Use custom Visualforce error pages, if you want authenticated users to see your custom branded Visualforce error pages.
- Show all settings available in Community Management or Community Workspaces that are hidden by default based on how
  you set up your community. Enabling this setting overrides the dynamic navigation provided in Community Management
  and Community Workspaces.

## **Community Management or Community Workspaces**

- Allow members to flag posts, comments, or files for moderation on page 303 within your community. Members may want to flag items that contain inappropriate language or sensitive information.
- Enable Reputation on page 333to allow community managers to set up a point system that rewards users who participate in the community. Administrators set up corresponding reputation levels that users see on their profile.

• Enable knowledgeable people on page 333so 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.

#### 4. Click Save.

#### IN THIS SECTION:

#### Show Nicknames Instead of Full Names in the Community

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

#### **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.

## Use Custom Visualforce Error Pages for Authenticated Users

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

#### Limit Files in Your Community

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

#### Configure a Custom Domain for Your Community

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

## Add the Global Search Box to Your Customized Community HTML Header

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

#### Choose a Landing Tab

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

Migrate Communities From Your Sandbox to Production

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

Nicknames are shown in place of first and last names in almost all locations in the community, including in feeds, list views, groups, search results, recommendations, and on user profiles and files. Additionally, Salesforce 1 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:

**Enable Optional Community Features** 

## **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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 logging in.

Public access to any community depends on the level of access you grant to the guest user profile. Make sure that you enable access to Chatter content for guest users via the API.



**Note**: You can also control access to public content at the page level from 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. You can access the guest user profile in one of the following ways and change the profile settings to open up or limit access to your community's public content.

- 1. Open Community Workspaces or Community Management.
- 2. For communities using the Salesforce Tabs + Visualforce template:
  - **a.** Under Administration, click **Pages** and then click **Go to Force.com**.
  - **b.** On the site settings page, click **Public Access Settings** to edit the guest profile page.
  - **c.** To update the profile access permissions, click **Edit** and make your updates.
  - d. Click Save.

For template-driven communities, you can also access the guest user profile from Community Builder settings. Click **General** and then click the link under the Guest User Profile section.

# () Important:

- 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.
- Page variations and page-level settings gate access to your community pages.
- When you add custom components to your community, they can bypass the object- and field-level security (FLS) you set for the guest user profile. Lightning components don't automatically enforce CRUD and FLS when referencing objects or retrieving the objects from an Apex controller. This means that the framework continues to display records and fields for which users don't have CRUD permissions and FLS visibility. You *must* manually enforce CRUD and FLS in your Apex controllers.

## **Enabling API Access to Chatter for Guest Users**

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

- Case
- Featured Feeds
- Feed
- Group

## **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

## **USER PERMISSIONS**

To enable public access to community content:

"Create and Set Up Communities"

**AND** 

- Group Detail
- Headline
- Record Information Tabs
- Related Lists
- Reputation
- Search & Post Publisher

To enable access to Chatter functionality, access Community Workspaces or Community Management.

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

Enabling public access through the guest user profile and the API exposes data for guest users through Chatter in Apex which is helpful when you're building your own community pages from scratch.

#### SEE ALSO:

Enable Optional Community Features

Methods Available to Communities Guest Users

## Use Custom Visualforce Error Pages for Authenticated Users

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

To assign or customize your Visualforce error pages, in Community Workspaces or Community Management, click **Administration** > **Pages** and click **Go to 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. Open Community Workspaces or Community Management.
- 2. Click Administration > Preferences.
- 3. Select Use custom Visualforce error pages, then click Save.

## **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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 Workspaces or Community Management, contact Salesforce.

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

#### 3. Click Save.

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

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

#### SEE ALSO:

**Enable Optional Community Features** 

## **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

## **USER PERMISSIONS**

To limit the files in your community:

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

AND

## 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 and Lightning Experience

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

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

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

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

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

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

## Choose a Landing Tab

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

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

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

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

## Migrate Communities From Your Sandbox to Production

In order to properly set up and test the implications of Communities on your organization, we recommend that you deploy Communities in your sandbox first. You can then use the Metadata API to retrieve your data and migrate it over to your production environment.



Note: In the API, the network represents a community.

For additional information on the Metadata API and instructions on migrating data, see the *Metadata API Developer's Guide* and the *Force.com Migration Tool Guide*.

## **Prerequisites**

Before migrating data to an organization, ensure that:

 An administrator has enabled Communities for your org. To enable Communities in an organization, from Setup, enter Communities Settings in the Quick Find box, select Communities Settings, and then select Enable. If you don't see this option, contact your Salesforce representative.



**Note:** When you enable Communities, you must select a domain name. Ensure that you enter the same domain name that you used in your sandbox organization or you will get an error.

## **Considerations**

- When a community is created, we create the following behind the scenes.
  - Custom site

The custom site is migrated with the community. Check the XML file to make sure all custom site dependencies are brought over as well. If any are missing, you may need to explicitly state them all in the XML file.

- Every network has a unique name and URL path prefix. When we retrieve the network, a file is generated. The name of the file is based on the name of the network. When migrating, the API looks at the file name and if it already exists, updates the community. If it doesn't exist, the API creates a new community. If someone changes the community name in the sandbox and then tries to migrate, they will see an error because the API is trying to create a new community with the existing path prefix.
- Once profiles are migrated, users are added to the community in the production organization. Subsequently, emails are sent to members as if it was a new community.

## Sample Template

The following template contains all of the fields that can be migrated through the Metadata API.

```
<Network xmlns="http://soap.sforce.com/2006/04/metadata">
    <changePasswordEmailTemplate>unfiled$public/
CommunityChangePasswordEmailTemplate</changePasswordEmailTemplate>
   <emailSenderAddress>admin@yourorg.com</emailSenderAddress>
   <emailSenderName>Admin User
   <forgotPasswordEmailTemplate>unfiled$public/
CommunityForgotPasswordEmailTemplate</forgotPasswordEmailTemplate>
   <invitationsEnabled>false</invitationsEnabled>
   <networkProfiles>
     ofile>
       <fullName>Admin Profile</fullName>
        <classAccesses>
          <apexClass>*</apexClass>
          <enabled><boolean></enabled>
        </classAccesses>
        <pageAccesses>
          <apexPage>*</apexPage>
          <enabled><boolean></enabled>
        </pageAccesses>
        <userLicense>Salesforce</userLicense>
     </profile>
    </networkProfiles>
    <networkTabSet>
     <defaultTab>home</defaultTab>
     <standardTabs>Chatter</standardTabs>
    </networkTabSet>
    <portal>FirstNetwork</portal>
    <sendWelcomeEmail>true</sendWelcomeEmail>
    <site>FirstNetwork</site>
    <status>UnderConstruction</status>
    <urlPathPrefix>brand</urlPathPrefix>
    <welcomeEmailTemplate>unfiled$public/
CommunityWelcomeEmailTemplate</welcomeEmailTemplate>
</Network>
```

## Sample package.xml Manifest File

A manifest file defines the components you are trying to retrieve. The following sample shows a package.xml manifest file for retrieving all the components of a community.

```
<?xml version="1.0" encoding="UTF-8"?>
<Package xmlns="http://soap.sforce.com/2006/04/metadata">
   <types>
        <members>*</members>
        <name>Network</name>
   </types>
    <types>
        <members>*</members>
        <name>CustomSite</name>
    </types>
    <types>
        <members>*</members>
        <name>CustomTab</name>
    </types>
    <types>
        <members>*</members>
        <name>CustomObject</name>
    </types>
    <types>
        <members>*</members>
        <name>ApexClass</name>
    </types>
    <types>
        <members>*</members>
        <name>ApexPage</name>
    </types>
    <types>
        <members>*</members>
        <name>ApexComponent</name>
    </types>
    <types>
        <members>*</members>
        <name>Portal</name>
    </types>
    <types>
       <members>*</members>
       <name>Profile</name>
    </types>
    <version>28.0
</Package>
```

# Set Up Search Engine Optimization (SEO) for Your Community

Have search engines, such as  $Google^{\mathbb{T}}$  or  $Bing^{\mathbb{T}}$ , 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 $^{\text{m}}$ , 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<sup>™</sup> Webmaster Tools and Bing<sup>®</sup> 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>/s/sitemap.xml
Sitemap: http://<community_URL>/<sub_path>/s/sitemap.xml
</apex:page>
```



**Note:** You may have more than one community, each with various subpaths. Keep in mind that they all share the same 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.** From Community Workspaces or Community Management, click **Administration** > **Pages** and click **Go to Force.com**. Then click **Edit** on the Site Details page.
- 6. In the **Site Robots.txt** field, enter the name of the Visualforce page you created, or click \left\( \sqrt{1}\) 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

# Customize Login, Self-Registration, and Password Management for 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.

#### IN THIS SECTION:

#### 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.

#### 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.

## 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.

## **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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. Open Community Workspaces or Community Management.
- **2.** Click **Administration** > **Login & Registration** and make your changes in the Header and Footer section.
- **3.** Upload a logo for the community login page header.

The file can be .gif, .jpg, or .png. The maximum file size is 100 KB. Images larger than 250 pixels wide or 125 pixels high aren't accepted. Uploading a logo automatically creates a Communities Shared Document Folder on the Documents tab and saves the logo there. Once created, you can't delete the folder.

The header logo displays at the top left of the standard login page. It is also used when you access the community in 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, Self-Registration, and Password Management for Your Community Customize the Login Process with Apex

## **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

## **USER PERMISSIONS**

To create, customize, or activate a community:

 "Create and Set Up Communities"

**AND** 

# 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 Workspaces or 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 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 custom login page, remember to modify the CommunitiesLoginController Apex controller and the Site.login() Apex method.
- 1. Open Community Workspaces or Community Management.
- 2. Click **Administration** > **Login & Registration** and make your changes under the Login section.
- **3.** Optionally, choose a custom login page for your community. Select the page type (**Community Builder** or **Visualforce**), enter the name of the page in the search field, and click . In the search results window, click the name of the page to select it.
  - Tip: To revert to the default login page for your community's template, select **Default Page**.
- **4.** 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<sup>©</sup>, Janrain<sup>©</sup>, or Salesforce credentials from another organization, select those from the list.

- (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 94 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.

## **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

## **USER PERMISSIONS**

To create, customize, or activate a community:

 "Create and Set Up Communities"

AND

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, Self-Registration, and Password Management for 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. Open Community Workspaces or Community Management.
- 2. Click AdministrationLogin & Registration.
- **3.** In the Logout section, enter the URL you want to redirect community members to.
- 4. Click Save.

SEE ALSO:

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

# **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

## USER PERMISSIONS

To create, customize, or activate a community:

 "Create and Set Up Communities"

AND

# 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. Open Community Workspaces or 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 , 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, Self-Registration, and Password Management for Your Community

# Set Up Self-Registration for Your Community

Enable self-registration to allow unlicensed guest users to join your community. 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 Workspaces or 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.

## **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

## **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

## **USER PERMISSIONS**

To create, customize, or activate a community:

 "Create and Set Up Communities"

AND

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.

- Note: Renaming or deleting the default self-registration page can cause problems with the default self-registration flow.
- 1. Open Community Workspaces or Community Management.
- 2. Click Administration > Login & Registration.
- **3.** In the Registration section, select **Allow external users to self-register**.
- 4. Optionally, choose a custom self-registration page for your community. Select the page type (Community Builder or Visualforce), enter the name of the page in the search field, and click ... In the search results window, click the name of the page to select it. To revert to the default self-registration page (CommunitiesSelfReg), select Default Page.

  Community Builder pages must be published to be included in the page lookup search results. Remember to modify the self-registration CommunitiesSelfRegController and CommunitiesSelfRegConfirmController Apex controllers if you use a custom page.
- **5.** Select the default **Profile** to assign to self-registering users.
  - Note: You can only select portal profiles that are associated with the community. If a profile is selected as the default for users who self-register, and you remove it from the community, the self-registration Profile is automatically reset to None.
- **6.** Select the business **Account** that you want to assign self-registering users to.

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

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

#### 7. Click Save.

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

- Salesforce creates a new user record with the information they provide on the self-registration page.
- The user is assigned the profile you specified when you set up self-registration.
- The user is associated with a business account or a person account, depending on how you set it up.
- Customer Community Plus and Partner Community licenses require user records to be associated with a role in your organization. If you don't specify a role in the default self-registration profile, Salesforce assigns them the Worker role.
- Note: Keep in mind that each time a user self-registers, they consume one of your Communities licenses. When setting up your self-registration page, be sure to add some criteria to ensure that the right people are signing up. Additionally, to prevent unauthorized form submissions, we recommend using a security mechanism, such as CAPTCHA or a hidden field, on your self-registration page.

#### SEE ALSO:

Customize Login, Self-Registration, and Password Management for 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.

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

Salesforce creates separate person accounts for each self-registering user. Each user is assigned the default profile you specified while setting up self-registration, and a default role. If you don't specify

a role, either on the profile or via the self-registration Apex controller, Salesforce assigns the Worker role to the self-registering users. You can further customize this functionality by using the self-registration Apex controller (CommunitiesSelfRegController), but it's not required.

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

## Customize the Community Self-Registration Process with Apex

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

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

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

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

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

# **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

### **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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



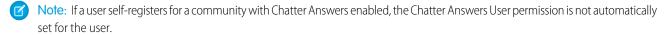
**Note:** Note that regardless of which role you enter for the roleEnum, the role for new users will default to None. Once a user self-registers, you can update their role on the user detail page.

**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, 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 **Community Workspaces** or **Manage** next to a community.
  - **b.** Click **Administration** > **Pages** and then click **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.



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

# **Enable Other Salesforce Features in Communities**

Salesforce Communities offers a platform to expose a ton of Salesforce features and functionality to community members. For example, enable Salesforce Knowledge so customers can view knowledge articles in your community. Enable case feeds to facilitate discussions over customer cases. Or, let partners view Wave Analytics dashboards in your community. There's also Chatter Questions, direct messages, Question-to-Case, and field service data. It's all fair game!

## **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

## **Enable Cases for Communities Users**

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

When you enable cases for external users in your community, you can assign cases to those members. Additionally, external members can edit cases, create new cases, add case comments, reassign cases, find case solutions, and create case teams.



**Note:** Case comments added by external users in communities are public and can be viewed by any user that can view the case. Also, external users can't edit case comments, associate assets with cases, delete cases, or update the case status.

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

## **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

### **USER PERMISSIONS**

To enable cases for Communities users:

 "Manage Profiles and Permission Sets"

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

SEE ALSO:

Merge Fields for Communities

# **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

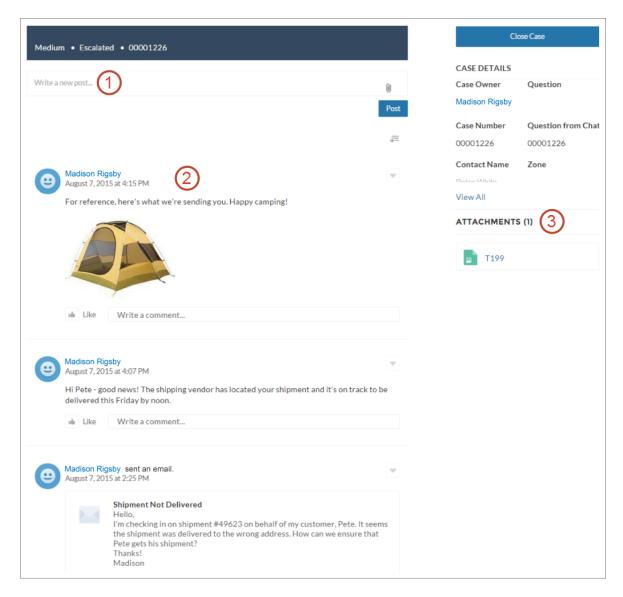
Χ

#### 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.

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;
```

Available in: Salesforce Classic

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

}
}

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**

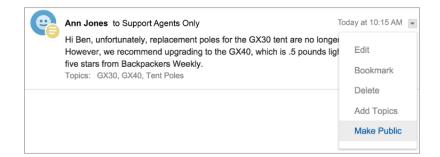
Available in: Salesforce Classic

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

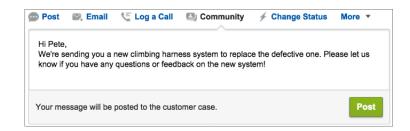
## Post on Cases and Community Questions with the Community Action in the Case Feed

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.

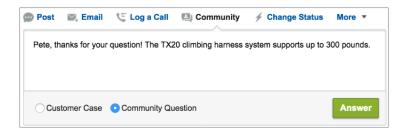
To post on cases in a customer portal or community:

- 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:

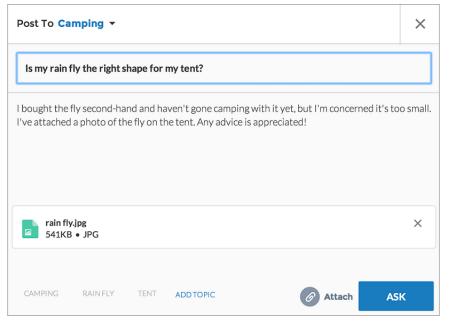
Community Case Feed

## **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:

- 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 Direct Messages in Your Community**

Allow community members to send direct messages to start a private conversation with one or more members. Direct messages are supported in all communities based on the Customer Service (Napili) template and in Lightning Bolt solutions, such as the Lightning Partner Management solution.



**Note**: Review the the limitations that apply before you enable direct messages for your community.

Direct messages offer privacy for more sensitive conversations. Imagine a scenario where a customer brings up an issue they have with a product in the community feed. A support rep can share that post and address the customer's concerns privately in a direct message. Similarly, a channel manager can discuss sensitive sales data with one or more partner users in a partner community.



**Note:** Private messages and direct messages are separate features. Direct messages are newer and offer a richer feature set for private communication in communities. Direct messages are based on Chatter and offer a rich text editor that supports inline images and attachments. With direct messages, you can start a message right from a feed post.

- 1. Make sure that Chatter is enabled in your org.
- 2. Open Community Workspaces or Community Management.
- **3.** Under Administration, click **Preferences**.
- **4.** Select **Enable direct messages** and save your changes.
- 5. In Community Builder, click the **Profile Header** component on the community Home page and select **Include My Messages**. This displays the My Messages link in the user profile dropdown menu.
- **6.** Optionally, add other components to your community pages to facilitate easy access to direct messages.
  - Add the Messages page to your community's navigation menu for prominent placement and easy access.
  - Add the New Message Button component to any page you want to allow community members to create messages from.
  - Add the **Message Notification** component to the community home page.
- 7. Publish your community.

After enablement, community members can start a direct message conversation:

- From the Messages page.
- From user profiles and from hovers on users names.
- From the Message Notification and the New Message Button components on community pages.
- By sharing a feed post as a direct message.

Members can also flag messages that are spam or inappropriate. They can also opt to receive email notifications when someone sends them a direct message or responds to a conversation they're a part of. Community members can access their direct message conversations by clicking **My Messages** in their user profile dropdown menu.

## **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

## **USER PERMISSIONS**

To enable direct messages:

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

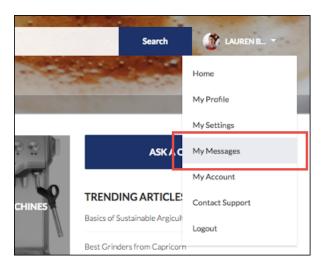
AND

Is a member of the community

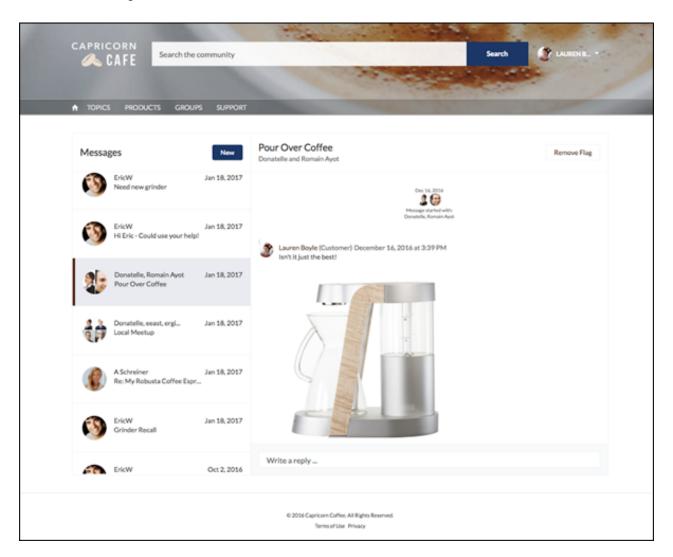
To make all posts available to moderation, including direct messages, in Communities Settings under Community Moderation Rule Settings:

 Moderation applies to all feed posts regardless of where they are visible

To enable Chatter:



Here's what the messages list view looks like:



#### SEE ALSO:

Edit Community Pages and Components in Community Builder Moderate Flagged Direct Messages in Your Community Manage Your Community Email Notifications Implementation Guide: Using Templates to Build Communities

### **Direct Message Limitations**

Before you enable direct messages for your community, review these considerations.

- Direct messages require Chatter to be enabled in your org.
- Direct messages can only be enabled in communities built using the Customer Service (Napili) template and in Lightning Bolt solutions.
- Users with the "View All Data" and "Modify All Data" permissions can't access direct message data unless they are participants in the conversation.
- Only users with the "Manage Chatter Messages and Direct Messages" permission can view all the direct messages data in your org.
- To moderate flagged direct messages, the moderator needs "Manage Chatter Messages and Direct Messages" permission and the "Moderate Communities Chatter Messages" permission.
- Community search doesn't show direct message in the search results to maintain privacy.
- When community members flag a direct message, the entire conversation is flagged. Individual messages can't be flagged.
- If you have private messages enabled in your community, they remain available. However, direct messages are better integrated with Lightning technology and we recommend that you switch to direct messages.

### For Developers

Direct messages are supported in the Chatter REST API. Under the hood, direct messages are a special implementation of feed posts and comments parented to a direct message entity. If you use the Chatter REST API to create a custom implementation of direct messages, a few things to keep in mind:

- The first message is stored as a feed post and the responses are stored as comments.
- Unlike other objects, direct messages can't have multiple feed posts associated with a single direct message conversation.
- You can't follow, like, share, mention people in, mute, and bookmark feed items associated with direct messages. You also can't associate topics with direct message feed items.
- Feeds associated with direct messages aren't accessible via search, public feeds, or streams.
- Email notifications for direct messages aren't supported for custom implementations built for the internal Salesforce org.
- In the community UI, direct messages display only to the participants in the conversation. However, Apex code runs in system mode, which means that the permissions of the current user aren't taken into account. This limitation has implications for pages that use Apex and Visualforce.
  - Review your Visualforce pages to ensure that direct message data isn't exposed.
  - Review your AppExchange apps that are written in Apex to ensure that direct message data isn't exposed.
  - Visualforce and Apex developers in your organization might be able to access direct message data.

## **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

Use permission sets, profile-level permissions, and sharing checks in your code to limit user access.

SEE ALSO:

**Enable Direct Messages in Your Community** 

# **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 **Community Workspaces** or **Manage** next to a community.
  - **b.** Click **Administration** > **Tabs**.
  - **c.** Add the Q&A tab to the Selected Tabs list.
  - d. Click Save.
  - e. Click Close.
- **5.** Make the Q&A tab visible on profiles that need access to it.
  - a. From Setup, enter *Profiles* in the Quick Find box, then select **Profiles**.
  - **b.** Click **Edit** for the profile that you want to make the Q&A tab visible for.
  - **c.** Under Standard Tab Settings, set the Q&A tab to Default On.
  - d. Click Save.

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

- A public-facing 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.

# **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

## **USER PERMISSIONS**

To enable Chatter Answers in Salesforce Communities:

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.

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

## **EDITIONS**

Available in: Salesforce Classic

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

## **USER PERMISSIONS**

To enable Question-to-Case:

## 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 Ouestion 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:

#### 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.

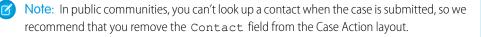
Then, check which record type the Escalate to Case action uses, and change it if necessary.

- 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.

## 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.



## **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"

## **EDITIONS**

Available in: Salesforce Classic

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

## **USER PERMISSIONS**

To customize page layouts:

## 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."

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:

## 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

- 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.



- 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.

## Let Guest Users Create Cases

When you set up Web-to-Case along with a case quick action, guest users can create a case without having to log in.

To let quest users create cases, first create a case page layout for unauthenticated users. This allows you to capture and create basic information that would already be associated with a registered user.

- 🚺 Tip: Assign case field-level security and quest user actions appropriately so quest users have access to what they need but can't see your company private information.
- Note: Guest users can't attach files when creating a case.
- 1. From Setup, enter Web-to-Case in the Quick Find box, then select Web-to-Case.
- 2. Select Enable Web-to-Case.
- 3. To ensure that guest users can log cases through contact support, from Setup, enter Communities in the Quick Find box, then select All Communities.
- 4. Select **Builder** next to the community you want your guest users to log cases via contact support.
- **5.** Click the drop-down arrow next to your community name and select **Community Management**.
- **6.** On the left-hand panel, click **Administration**.
- 7. Click Pages.
- 8. Click Go to Force.com.
- 9. On the Sites Detail page, click Edit.
- 10. Enable Guest Access to the Support API.
- 11. Add NewCase, or a custom quick action to add cases, to the Selected Quick Actions.
- 12. Click Save.
  - Note: When using a self-service template, it's unnecessary to set up the other options on the Web-to-Case Settings page.

# **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 org 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.
- Note: Lightning Knowledge isn'tavailable in communities.

### **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"

# **Enable Ideas in Your Community**

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

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

- 1. From Setup, enter *Ideas Settings* in the Quick Find box, then select **Ideas Settings** 
  - **a.** To enable Ideas for your organization, select the Enable Ideas checkbox.
  - b. Optionally, select Enable Text-Formatting, Images and Links to enable the Ideas HTML editor, which gives users WYSIWYG HTML editing and image referencing capabilities when they post or comment on ideas.
    - Once you enable the HTML editor, you can't disable it.
  - c. Ensure that the multi-select Categories field is enabled by clicking the **Enable** button located below the Categories message at the top of the page. This button is not displayed if your organization already has the Categories field enabled.
  - **d.** To let Ideas members associate more than one category with an idea, select Enable Categories. Once you enable multi-select categories, you can't disable it.
  - e. To let users earn points and ratings based on their activity in each zone, select Enable Reputations.
  - f. In the Half-Life (in Days) field, enter the number of days.

    The half-life setting determines how quickly old ideas drop in ranking on the Popular Ideas subtab, to make room for ideas with more recent votes. A shorter half-life moves older ideas down the page faster than a longer half-life.
- 2. Define and customize fields for Ideas:
  - **a.** Define picklist values for the Categories and Status fields.

    Make sure that you add the categories and statuses to the zones you'll be including in the community.
  - **b.** Set field-level security for standard and custom fields.
  - 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.

## **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

## **USER PERMISSIONS**

To customize Ideas settings:

# Set Up Approvals for External Users in Your Community

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

An approval process automates how records are approved in Salesforce. An approval process specifies each step of approval, including who to request approval from and what to do at each point of the process.

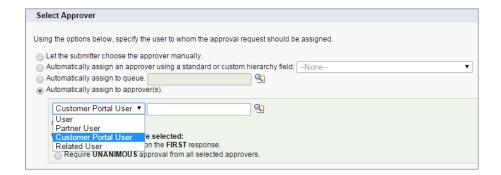


#### Note:

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

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

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



### **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

### **USER PERMISSIONS**

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

"Customize Application"

To create or change queues:

"Customize Application"
 AND

"Manage Public List Views"

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

In 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.



Note: Field Service is available only in Visualforce and tab-based communities.

- 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.

# **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<sup>©</sup>, Janrain<sup>©</sup>, 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, Self-Registration, and Password Management for Your Community

# Configure SAML for Communities

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

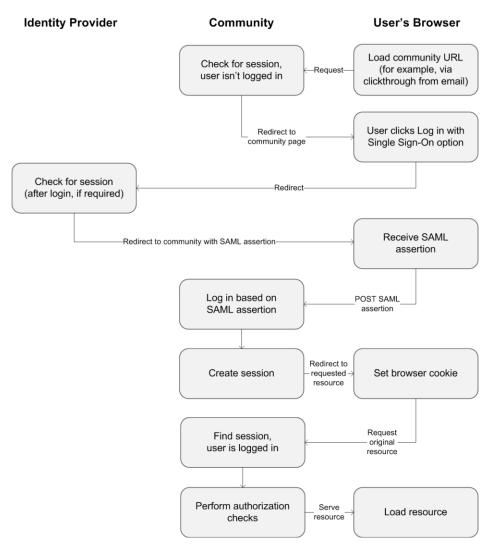
The following information assumes that you are already familiar with Security Assertion Markup Language (SAML) authentication protocols and know how to work with your identity provider to configure single sign-on for your organization. When implementing SAML for communities, the key is to use the community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

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

# **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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



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

Requirement	Standard	Portal	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<sup>©</sup>, Janrain<sup>©</sup>, 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:

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

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, Self-Registration, and Password Management for Your Community

# Configure Authentication Flows with OAuth

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

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



**Note:** 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.

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

https://login.salesforce.com/services/oauth2/authorize? response\_type=token&client\_id=your\_app\_id&redirect\_uri=your\_redirect\_uri Replace the login.salesforce.com host name with the full path to the community URL:

**EDITIONS** 

Available in: Salesforce Classic and Lightning Experience

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.



**Note:** Beginning with Spring '17, Shield Platform Encryption no longer masks encrypted data. This may affect some users' ability to work with encrypted data. If you have data you don't want specific users to see, revisit their field-level security settings, record access settings, and object permissions.

Keep the following things in mind:

- You can encrypt data in communities, but not in portals.
- If you are using Classic Encryption, data in encrypted custom fields is still masked.
- Your community's specific settings for personally identifiable information (PII) apply regardless of whether data is encrypted.
- Data encryption doesn't change anything about the community user experience. However, encrypting the Account Name field has
  an effect on how users' roles are displayed to admins. Normally, a community user's role name is displayed as a combination of their
  account name and the name of their user profile. When you encrypt the Account Name field, the account ID is displayed instead of
  the account name.

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

# 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 Community Builder with Templates
- Use Visualforce and Force.com Sites

You can also customize these other areas of your community:

- Add the Global Search Box to Your Customized Community HTML Header on page 54
- Configure a Custom Domain for Your Community
- Rename the Chatter Tab

#### IN THIS SECTION:

Choosing Between Community Builder 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.

Use Community Builder (Site.com) Without Templates

#### Use Visualforce and Force.com Sites

Each community has one associated Force.com site that lets you make advanced customizations to your community.

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

<sup>\*</sup>Available in Community Builder for Communities users only.

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

- Community Builder Overview on page 227
- Force.com Sites

• Community Builder (Site.com)

#### 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.** Beside the community name, click **Build** or **Community Workspaces** > **Builder**.
- 3. In Community Builder, you can:
  - Brand your community on page 229.
  - 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

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

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.

# 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 quest 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 ?iscontrib 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

# 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 your community. To do this, open Community Workspaces or Community Management. Next, under Administration, click **Pages** and then click **Go to Force.com** or **Go to Site.com Studio**. Page selections in Community Management or Community Workspaces automatically override any previously specified page selections in the Site.com or 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.

### **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

- Must contain a page named maintenance.html at the root level of the .zip file. Other resources in the .zip file, such as images or CSS files, can follow any directory structure.
- Must contain only files that have file extensions.

For more information, refer to Assigning Force.com Site Error Pages in the Salesforce Help.

- 1. Open Community Workspaces or Community Management.
- 2. Navigate to Administration > Pages.
- **3.** Click next to **Service Not Available** to search for and select your custom page.
- 4. Click Save.

If there is a service outage at any time, your community displays your selected page. A couple things to keep in mind:

- This page selection doesn't affect communities that use Site.com Studio pages.
- The Service Not Available page, once customized, is available for all communities in the same domain. Depending on the needs of your organization, this might not be desirable. To avoid using the same page for all the communities in your domain, create and assign separate Service Not Available pages for each community.

For example, consider a scenario where you have two communities in your domain: a customer community (universaltelco.force.com/customer) and a partner community (universaltelco.force.com/partner). If you use a custom Service Not Available page for only the customer community, then the partner community will display the same page during a service outage, unless you create and assign a separate Service Not Available page to the partner community.

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. Open Community Workspaces or Community Management.
- 2. Click Administration > Pages.
- **3.** For the Community Home page:
  - a. Select the page type: Community Builder or Visualforce.
  - **b.** Enter the name of the page or leave the field blank to get a list of available options.
  - **c.** Click , then click the name of the page in the search results to select it.



**Note:** Only published Community Builder (Site.com Studio) pages are included in the search results.

4. Click Save.

# **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

Page selections in Administration automatically override any previously specified page selections in the Site.com or Force.com site properties.

SEE ALSO:

Configure the Default Community Login Page to Use a Custom Home Page Override Default Pages in Your Community with Custom Pages

# Configure the Default Community Login Page to Use a Custom Home Page

If you're using external authentication providers and a custom home page, ensure that users are accessing the correct home page.

To do so, edit the CommunitiesLandingController so that it has the correct startURL for your community. The CommunitiesLandingPage is the Active Site Home Page for your community, meaning that it is shown when someone enters a direct URL to your community. For instance, if your domain is universaltelco.force.com and your community URL is customers, the CommunitiesLandingPage is shown when someone enters http://universaltelco.force.com/customers.

There are 2 methods for using a custom home page:

- Update the CommunitiesLandingController code to redirect to the new page:
  - 1. From Setup, enter Apex Classes in the Quick Find box, then select Apex Classes.
  - 2. Click **Edit** next to CommunitiesLandingController.
  - **3.** Replace the code so that it reads:

# **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

### **USER PERMISSIONS**

To access Community Management or Community Workspaces:

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

To customize administration settings:

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

To edit Apex classes:

"Author Apex"

```
}else {
    return Network.communitiesLanding();
}

public CommunitiesLandingController() {}
}
```

- **4.** Replace <a href="https://universaltelcom.force.com">https://universaltelcom.force.com</a> 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.

- Tip: Communities can have a combination of Visualforce and Site.com pages. By default, the pages you create don't require login, but you can add authenticated pages if needed.
- **1.** Open Community Workspaces or Community Management.
- 2. Click **Administration** > **Pages** and then in the Advanced Customizations area, click either:
  - Go to 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

# 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.

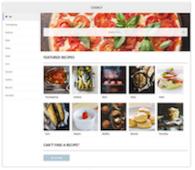
Your customers want an easy way to interact with your company whenever and wherever they are. A self-service community gives your customers an easy way access the information they need when they have questions. With communities built on the Koa and Kokua templates, customers can search for information 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 and Lightning Experience

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.

### IN THIS SECTION:

### 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.

### Objects Supported by Out-of-the-Box Components and Pages in Community Templates

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

### Customer Service (Napili) 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.

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

The Customer Service (Napili), Koa, Kokua, and Aloha templates are each composed of pages, which in turn are made up of customizable components. Consult this table to find out which templates each component can be used in, and when it became available.

SEE ALSO:

**Create Communities** 

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
Majority of standard Salesforce objects				<b>▽</b>
Accounts			~	~
Campaigns			~	~
Cases	~	~	~	~
Community Builder	~	~	<u>~</u>	
Community Discussions			~	<b>✓</b>
Contacts and Shared Contacts			~	<b>✓</b>
Contacts to Multiple Accounts				~
Custom Objects			~	~

# EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

	Koa	Kokua	Customer Service (Napili)	Salesforce Tabs + Visualforce
Customizations using Lightning Components	<b>▽</b>	~	<b>~</b>	
Customizations using Visualforce				~
Salesforce Knowledge	Required	Required	Recommended	Recommended
Knowledgeable People			<b>▽</b>	~
Leads			~	~
Notes			<u>~</u>	~
Opportunities			<b>✓</b>	~
Optimized for Mobile	<b>✓</b>	~	<b>✓</b>	~
Orders				~
Question-to-Case			<b>✓</b>	
Recommendations			<u>~</u>	
Reputation			<b>~</b>	
Topics			<b>~</b>	~
Trending Articles	~	~	~	

SEE ALSO:

Implementation Guide: Using Templates to Build 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.

	<ul> <li>Headline</li> <li>Record Banner</li> <li>Record Detail</li> <li>Record Information Tabs</li> <li>Related Records</li> </ul>	<ul><li>Navigation Menu</li><li>Object Home Page</li></ul>	<ul> <li>Create Record Button</li> <li>Create Record Form</li> </ul>
Account (Account)	<b>✓</b>	<b>▽</b>	~
Activity History (ActivityHistory)	<b>✓</b>		
Approval History (ProcessInstanceHistory)	~		
Approval Process Work Item (ProcessInstanceWorkitem)	<b>~</b>		
Approval Step (ProcessInstanceStep)	~		
Asset (Asset)	~	~	~
Campaign (Campaign)	<b>▽</b>	~	~
Campaign Member (CampaignMember)	~	•	
Case (Case)	<b>✓</b>	~	~
Contact (Contact)	<b>✓</b>	~	~
Custom Objects	<b>▽</b>	~	~
Dashboard (Dashboard)	<b>✓</b>	<u>~</u>	
Email Message (EmailMessage)	~		
Event (Event)	<b>✓</b>		<u>~</u>
External Objects	~	~	~
Group (CollaborationGroup)	~		~
Lead (Lead)	~	~	~
Note (Note and NoteAndAttachment)	<u>~</u>		
Open Activity (OpenActivity)	<u>~</u>		
Opportunity (Opportunity)	<u>~</u>	~	~
Opportunity Contact Role (OpportunityContactRole)	~		<b>▽</b>

	<ul> <li>Headline</li> <li>Record Banner</li> <li>Record Detail</li> <li>Record Information Tabs</li> <li>Related Records</li> </ul>	<ul><li>Navigation Menu</li><li>Object Home Page</li></ul>	Create Record Button     Create Record Form
Opportunity Product (OpportunityLineItem)	<b>▽</b>		
Opportunity Team Member (OpportunityTeamMember)	<b>▽</b>		
Product (Product2)	<u>~</u>	<u>~</u>	~
Report (Report)	<u>~</u>	<u>~</u>	
Service Appointment (ServiceAppointments)	<b>▽</b>	<b>▽</b>	
Shared Contacts (AccountContactRelationship)	<b>▽</b>		
Task (Task)	<u>~</u>	<u>~</u>	~
User (User)	<u>~</u>		~
Work Order (WorkOrder)	~	~	~
Work Order Line Item (WorkOrderLineItem)	~		<b>▽</b>



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 y	VOU	beain:
DC1010	,	~~g

Gather your branding assets:

High-resolution image of your company logo
Color scheme (or an image to upload to automatically generate one)

### **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

☐ Image to use as a header
☐ Thumbnail images (385x385 pixels), if you're using Featured Topics
In your internal Salesforce org:
Enable Salesforce Communities. Choose a unique URL that works for your business, because you can't change it after it's been set.
Set up email templates for any communication between the community and its members (welcome email, resetting password email, and so on).
Enable the Global Header for Communities for the system administrator profile and any other profiles that can access your community from the internal org.
Enable any Service Cloud features you plan to use in the community, such as Salesforce Knowledge.
Review profiles and add permission sets as needed.
Set up Web-to-Case.
If you're using Salesforce Knowledge:
Review your data categories.
Enable feed tracking for your Knowledge article types.
As You're Making Your Community:
In your internal Salesforce org:
Add members to your community.
Configure the Guest User Profile (access using Community Management or the Community Builder):
Give read and create permissions for the case object.
If using Salesforce Knowledge, give guests access to your data categories.
In Community Management or Community Workspaces:
Set up navigational topics and subtopics, and associate articles to each topic.
Set up featured topics and associated images
Download the latest Salesforce Communities Management from the AppExchange.
Set up moderation criteria and rules.
Enable and set up reputation.
In Community Builder:
Customize your community to match your company's branding.
Add standard and custom Lightning components to customize their design and content.
After Making Your Community
Set up an internal Chatter group for feedback, and invite people to take a test drive while the community is still in preview mode.
Incorporate their feedback, and then publish your community.
Seed the community with some initial content: welcome posts, groups, and relevant or fun articles.

# Which Components Can I Use with Each Template?

The Customer Service (Napili), Koa, Kokua, and Aloha templates are each composed of pages, which in turn are made up of customizable components. Consult this table to find out which templates each component can be used in, and when it became available.

1 Tip: The Components panel in Community Builder lists all components that you can add to the page you're editing.

Communities that are based on Salesforce Tabs + Visualforce don't use Lightning components.

Component	Customer Service (Napili) and Lightning Bolt Solutions	Koa	Kokua	Available in Versions
Article Content	~			All versions
Article List		~	<b>✓</b>	All versions
Article Type Filter		~	<b>✓</b>	All versions
Article View		~	<b>✓</b>	All versions
Ask Button	<b>~</b>			All versions
Back Button		~	<b>✓</b>	All versions
Breadcrumb	<u>~</u>			All versions
Case Attachments	<u>~</u>	<b>~</b>	<u>~</u>	All versions
Case Banner	<b>✓</b>	<b>~</b>	<u>~</u>	All versions
Case Comments	<b>✓</b>	<b>~</b>	<b>✓</b>	All versions
Case Comments Publisher	~	~	~	All versions
Case Detail	<b>✓</b>	<b>~</b>	<b>✓</b>	All versions
Case Feed	<u>~</u>	~	<b>✓</b>	Summer '15 and later
Case Feed Publisher	<b>✓</b>	<b>~</b>	<u>~</u>	Summer '15 and later
Case List	<u>~</u>	~	<b>✓</b>	All versions
Category Filter		<b>~</b>	<u>~</u>	All versions
Category Navigation		<b>~</b>	<u>~</u>	All versions
Contact Support & Ask Buttons	1	~	~	All versions
Contact Support & Ask Buttons	~			Winter '16 and later
Create Case Form	<u>~</u>	<b>~</b>	<u>~</u>	All versions

Component	Customer Service (Napili) and Lightning Bolt Solutions	Koa	Kokua	Available in Versions
Create Record Button	~			Winter '16 and later
Create Record Form	~			Winter '16 and later
Dashboard	~			Winter '16 and later
Dashboard List	<u>~</u>			Winter '16 and later
Expanded Category Navigation		~	~	All versions
Featured Data Categories		~	~	All versions
Featured Search		<b>✓</b>	~	All versions
Featured Topics	<b>✓</b>			Winter '16 and later
Featured Topics & Feeds	~			All versions
Feed	~			Winter '16 and later
Feed Compact	~			Winter '16 and later
Feed Post & Comments	~	~	~	Summer '15 and later
Feed Publisher	~			Winter '16 and later
Files List	~			Winter '16 and later
Follow Button	~			Summer '15 and later
Global Search Results	~			All Versions
Group	~			Winter '16 and later
Group Banner	~			Winter '16 and later
Group Detail	~			Winter '16 and later
Group Related List	~			Winter '16 and later
Headline	~			All versions
Knowledgeable People	~			Summer '15 and later
Language Picker	~			Winter '16 and later
Message Notification	~			Spring '17 and later
Navigation Bar	~			Before Winter '16

Component	Customer Service (Napili) and Lightning Bolt Solutions	Koa	Kokua	Available in Versions
Navigation Menu	~			Winter '16 and later
New Message Button	~			Spring '17 and later
Path	~			Winter '16 and later
Profile Header	~	<b>✓</b>	~	All versions
Recommendations	~			Summer '15 and later
Record Banner	~			Winter '16 and later
Record Information Tabs	~			Winter '16 and later
Record List	~			Winter '16 and later
Record Related List	~			Winter '16 and later
Related Articles List	~			Summer '16 and later
Related Questions List	~			Summer '16 and later
Related Topics List	~			Spring '15 and later
Report Chart	~			Winter '16 and later
Report List	~			Winter '16 and later
Report Summary	~			Winter '16 and later
Reputation Leaderboard	~			Spring '15 and later
Rich Content Editor	~	~	~	Winter '16 and later
Scroll To	~			All versions
Search		<b>✓</b>	~	All versions
Search & Post Publisher	~			All versions
Search Results	~			All versions
Set Case Status Button	~	~	<b>✓</b>	All versions
Tabs	~			Winter '16 and later
Toggle Button		~	<b>✓</b>	All versions
Topic Catalog	~			Spring '16 and later

Component	Customer Service (Napili) and Lightning Bolt Solutions	Κοα	Kokua	Available in Versions
Topic Description	~			Spring '16 and later
Topic Metrics	~			Winter '16 and later
Trending Articles		~	~	All versions
Trending Articles by Topic	~			All versions
Trending Topics	~			Spring '15 and later
Unanswered Questions	~			Winter '16 and later
User Profile	~			Spring '16 and later
User Profile Detail	~			Winter '16 only
User Profile Image	~	~	~	All versions
User Profile Knowledgeable About	~			Winter '16 and later
User Profile Related List	~			Spring '16 and later
User Profile Stats	~			Spring '15 and Summer '15
User Profile Summary	~	~	~	All versions
User Profile Summary & Image		~	~	Winter '16 and later
User Profile Tabs	~			Spring '15 and later
User Settings	~			Spring '15 and later
Visualforce Page Component	~			Spring '17 and later
CUSTOM COMPONENTS	5			
Custom Lightning Components	<b>✓</b>	<b>✓</b>	<b>✓</b>	Winter '16 and later

# Note:

• 1 Contact Support is included as part of the Contact Support & Ask Buttons component.

# **Login Template Components**

Component	Available in Versions
Background	All versions
Set Up the Content Block	Before Winter '16
Custom Code	Before Winter '16
Employee Login Link	All versions
Forgot Password	All versions
Login Form	All versions
Self-Registration	All versions
Social Login	All versions

### **Article Content**

The Article Content component lets users view and vote on an individual article after they've selected it from search results or browsing topics.



Note: Before Spring '16, this component was named Single Article View.

The article's title, latest revision date, and article type appear with the body of the article. Users can follow navigation links to browse other topics.



**Note:** When a user views an article that's been returned from a Web search, the navigation breadcrumbs show the path to the first topic associated with the article.

If you enable article voting for this component, authenticated users see a prompt to vote below each article. Users can give articles a thumbs up or thumbs down vote. If your organization uses star rating on articles, thumbs up votes are recorded as five stars and thumbs down votes are recorded as one star. Article voting is available in the Winter '16 version of community templates.

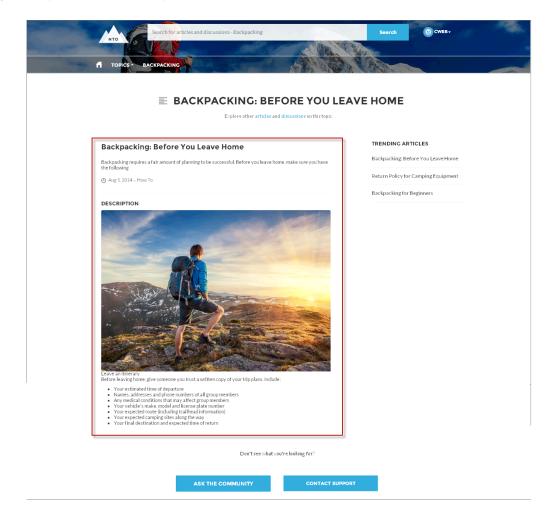
When a user votes on an article, a confirmation message appears next to their vote. The user can return to the article later to view their vote, but can't change it or see voting data from other community members. You can view an article's voting data at the top of the article in your organization.

- 1. Select the **Article Content** component in the page you're configuring.
- 2. In the property editor, configure properties for the component:

Property	Details
URL Name	This value is retrieved when the individual article is selected.
Enable Article Voting	Select this option, which by default is not selected, to let users vote on articles. This functionality is available only in the Winter '16 and later versions of community templates.
Voting Prompt Text	Enter the text that appears above the voting buttons. The default text is Was this article helpful? This functionality is available only in the Winter '16 and later versions of community templates.

Property	Details
Voting Confirmation Text	Enter the text that appears when a user votes on an article. The default text is Thanks for voting. This functionality is available only in the Winter '16 and later versions of community templates.

**Example:** Sample Article Content component:



### SEE ALSO:

Which Components Can I Use with Each Template?

### **Article List**

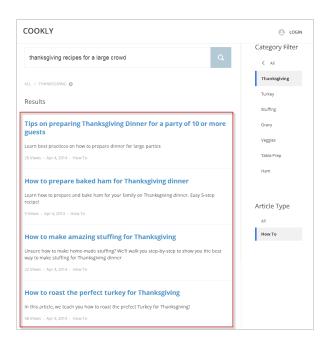
The Article List component lets users view articles that result from a search or from filtering without needing to leave the page.

The list includes the name and the type of article, its most current revision date, as well as how many views it's received. The list of articles can be filtered using the Article Type Filter component. The component also includes a breadcrumb component with navigation links, and a button that controls the appearance of the right menu for tablets and mobile display.

- 1. Select the Article List component in the page you're configuring.
- 2. In the property editor, configure properties for the component:

Property	Details
Category Name	The top-level category that contains the subcategories for articles is automatically set using an expression that uses the top-level category you specified in the template's Custom Properties.
Page Size	Enter the number of articles per page of the list. The default is 25.
Article Type	Specify the type of article to appear in the list.
Search Term	Leave this field blank. It's the field in which users type their search queries.

**Example:** Sample Article List component:



### SEE ALSO:

Which Components Can I Use with Each Template?

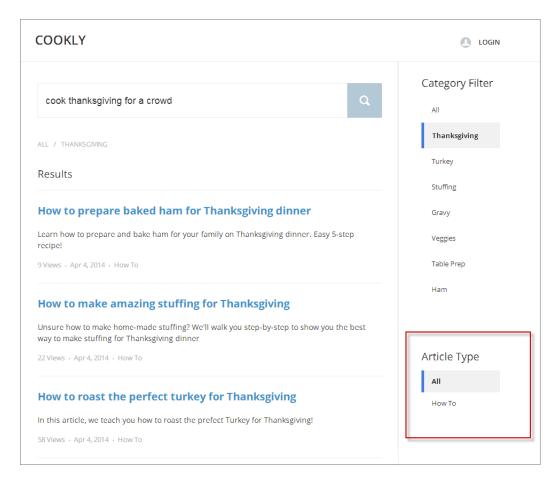
# Article Type Filter

The Article Type Filter component lets users filter the article list based on the selected article type after they've viewed search results. An article's type determines the type of content it contains, its appearance, and which users can access it.

Select the Article Type Filter component in the page you're configuring.
 There are no properties to set for this component.

**(1)** 

**Example**: Sample Article Type Filter:



SEE ALSO:

Which Components Can I Use with Each Template?

### **Article View**

The Article View component lets users view and vote on an individual article after they've selected it from search results.

The article's title, latest revision date, and article type appear with the body of the article. Users can click Back to return to the article list or follow navigation links to browse the parent categories.



**Note**: When a user views an article that's been returned from a Web search, the navigation breadcrumbs show the path to the first category associated with the article.

If you enable article voting for this component, authenticated users see a prompt to vote below each article. Users can give articles a thumbs up or thumbs down vote. If your organization uses star rating on articles, thumbs up votes are recorded as five stars and thumbs down votes are recorded as one star. Article voting is available in the Winter '16 version of community templates.

When a user votes on an article, a confirmation message appears next to their vote. The user can return to the article later to view their vote, but can't change it or see voting data from other community members. You can view an article's voting data at the top of the article in your organization.

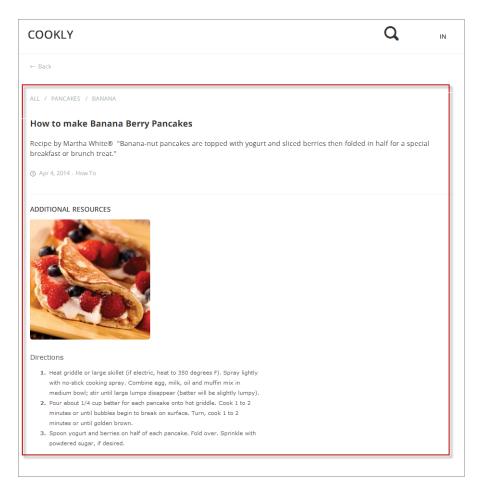
1. Select the **Article View** component in the page you're configuring.

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

Property	Details
URL Name	This value is retrieved when the individual article is selected.
Enable Article Voting	Select this option to let users vote on articles. This option is not selected by default. This functionality is available only in the Winter '16 and later versions of community templates.
Voting Prompt Text	Enter the text that appears above the voting buttons. The default text is Was this article helpful? This functionality is available only in the Winter '16 and later versions of community templates.
Voting Confirmation Text	Enter the text that appears when a user votes on an article. The default text is Thanks for voting. This functionality is available only in the Winter '16 and later versions of community templates.

**(1)** 

**Example**: Sample Article View component:



SEE ALSO:

Which Components Can I Use with Each Template?

# Articles with This Topic

The Articles With This Topic component is used on the Topic Detail page in communities built using the Customer Service (Napili) template. It shows articles that have been tagged with the topic in question.

- 1. Select the **Articles With This Topic** component in the page you're configuring.
- **2.** In the property editor, configure properties for the component:

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

Property	Details
Number of Articles	Select the number of articles you'd like to show at a time. The default number is 10.

**Example:** Sample Articles With This Topic component:



**CAMPING GEAR** 

# DISCUSSIONS ARTICLES Backpacking for Beginners First-time backpacker? Basic tips can go a long way to ensuring you and your group have a great time. 62 Views - Aug 31, 2014 - FAQ Backpacking: Before You Leave Home Backpacking requires a fair amount of planning to be successful. Before you leave home, make sure you have the following 83750 Views - Aug 31, 2014 - FAQ Don't see what you're looking for? ASK THE COMMUNITY CONTACT SUPPORT

### SEE ALSO:

Which Components Can I Use with Each Template?

### Ask Button

The Ask Button component lets users click a button and ask a question that is published to the community. Guest users must log in to ask questions and participate in discussions.

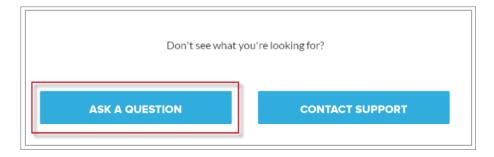
Note: Before Spring '16, this component was named Ask the Community.

The Customer Service (Napili) template pages come with two Ask Button components: one at the top of the page, and one at the bottom. The two aren't linked, so you can also remove one button or use different text for each button.

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

Property	Details
Button Label	Enter the text you'd like to display on the button that users can click to ask a question. The default text is Ask a Question.





SEE ALSO:

Which Components Can I Use with Each Template?

# **Back Button**

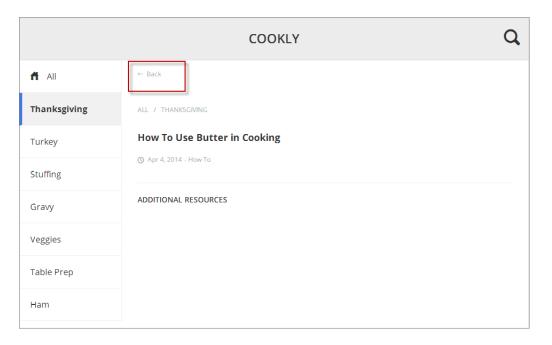
The Back Button component displays a button that lets users navigate to the previous context.

1. Select the **Back Button** component in the page you're configuring.

There are no properties to set for this component.



**Example**: Sample Back Button component:



### SEE ALSO:

Which Components Can I Use with Each Template?

### **Breadcrumb**

Use the Breadcrumb component in the Customer Service (Napili) template on topic, article, or feed detail pages to let your customers easily navigate back to parent or grandparent topics.

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

Property	Details
Unique Name or ID	Use {!topicID} on topic pages, {!feedItemID} on question or feed item pages, and {!urlName} on article pages.

### SEE ALSO:

Which Components Can I Use with Each Template?

### Case Attachments

The Case Attachments component lets users view a list of all attachments associated with a case.

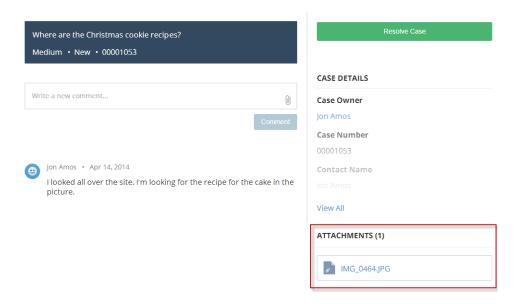
Mobile device users can expand and collapse the list of attachments when they are looking at the details of their case.



- You can't attach a file to a case while in Preview mode in Community Builder. When the community is published, you can
  attach files to cases.
- For users to see case attachments, the Case page layout and case record types for their profile must include the Attachments related list.
- 1. Select the Case Attachments component in the page you're configuring.
- 2. In the property editor, configure properties for the component:

Property	Details
Case ID	Leave the default query string for the unless you plan to customize the component and add your own query string. The system uses the query string in this field to return the Case ID.

**Example:** Sample Case Attachments component:



SEE ALSO:

Which Components Can I Use with Each Template?

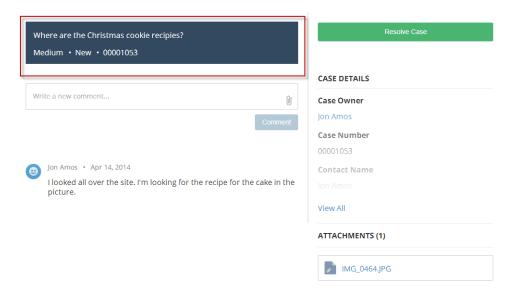
### Case Banner

The Case Banner component lets users see a case's status, case ID, and other summary information.

- Note: Before Spring '16, this component was named Case Highlights.
- 1. Select the Case Banner component in the page you're configuring.
- 2. In the property editor, configure properties for the component:

Property	Details
Case ID	Leave the default query string for the unless you plan to customize the component and add your own query string. The system uses the query string in this field to return the Case ID.

**Example**: Sample Case Banner component:



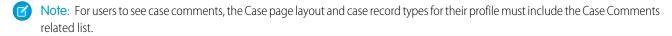
SEE ALSO:

Which Components Can I Use with Each Template?

### **Case Comments**

The Case Comments component shows a list of all the comments that a customer and an agent have added to the case.

If an attachment has been uploaded with a comment it is shown separately in the Attachments component.

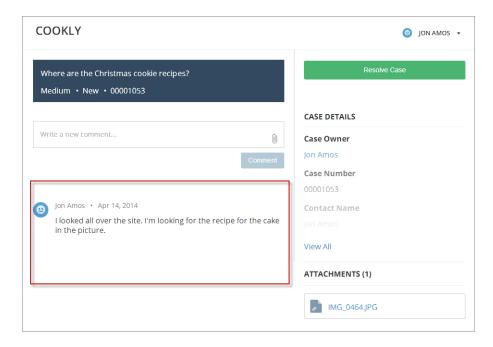


- 1. Select the Case Comments component in the page you're configuring.
- **2.** In the property editor, configure properties for the component:

Property	Details
Case ID	Leave the default query string for the unless you plan to customize the component and add your own query string. The system uses the query string in this field to return the Case ID.

0

**Example:** Sample Case Comments component:



SEE ALSO:

Which Components Can I Use with Each Template?

### Case Comments Publisher

Use the Case Comments Publisher component to let customers and agents collaborate using comments on cases. Your customers can open cases, post comments, upload attachments, and check the status of their cases from any of their devices.



Note: Before Spring '16, this component was named Case Publisher.

The component provides a chronological, filterable list of comments your customers and agents have had within the context of a case. It includes case activities, internal and external comments, attachments, and status changes. When authenticated users add a comment to a case, they can add a file to the case as an attachment. So when a customer creates a case using a mobile phone, they can take a picture with their phone's camera and attach it to the case.

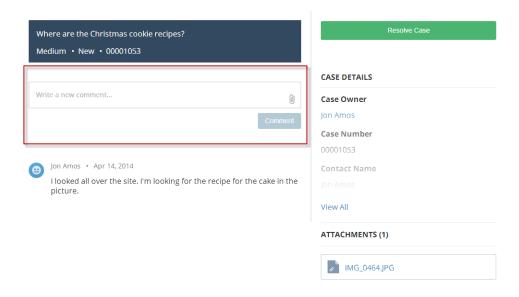
By default, users can attach any supported file type that is 5 MB or less. You can restrict the types of files that users can upload by changing the default values for content types on the Library tab.

- 1. Select the Case Comments Publisher component in the page you're configuring.
- **2.** To configure properties for the component, select the Properties pane:

Property	Details
Case ID	Leave the default query string for the unless you plan to customize the component and add your own query string. The system uses the query string in this field to return the Case ID.
Publisher Placeholder Text	Enter the text that appears in the search bar. The default value is <b>Write a new comment</b> .

Property	Details
Mobile Header Text	Enter the text that appears as the header for mobile users. Mobile and tablet see the text as the header for the comment text area.
Can Attach Files	Lets users attach a file to the comment.
Post Button Label	Enter the text for the button that submits the case or comment.

**Example:** Sample Case Comments Publisher component:



SEE ALSO:

Which Components Can I Use with Each Template?

# Case Detail

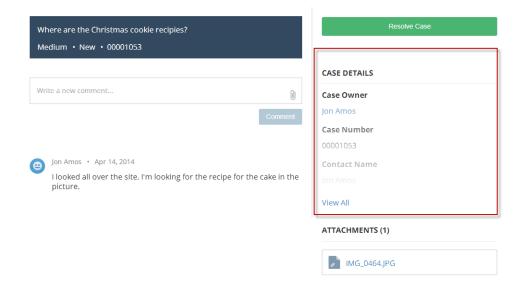
The Case Detail component lets users see all of the details of their case in a collapsible section.

- 1. Select the Case Detail component in the page you're configuring.
- **2.** In the property editor, configure properties for the component:

Property	Details
Case ID	Leave the default query string for the unless you plan to customize the component and add your own query string. The system uses the query string in this field to return the Case ID.

**(1)** 

**Example:** Sample Case Detail component:



SEE ALSO:

Which Components Can I Use with Each Template?

# Case Feed

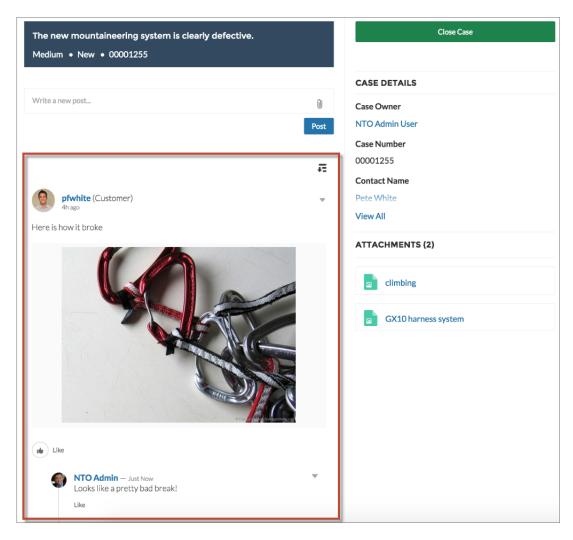
The Case Feed component shows a Chatter feed of all case interactions, including Chatter posts, case emails, questions related to the case, and attachments.

Comments and attachments on posts appear inline below the post for desktop and tablet users, and attachments are also shown separately in the Attachments component.

- (1) Important: Make sure to enable the community case feed so users see supported case interactions in their feed. For details, see Set Up the Community Case Feed.
- 1. Select the Case Feed component in the page that you're configuring.
- **2.** In the property editor, configure properties for the component:

Property	Details
Case ID	Enter this value: {!recordId}

**Example**: Sample Case Feed component:



### SEE ALSO:

Which Components Can I Use with Each Template?

### Case Feed Publisher

The Case Feed Publisher component lets customers create Chatter posts on cases and upload attachments from any of their devices.

Note: Before Spring '16, this component was named Case Chatter Publisher.

Attachments are shown in the Attachments component. By default, users can attach any supported file type that is 2 GB or less.

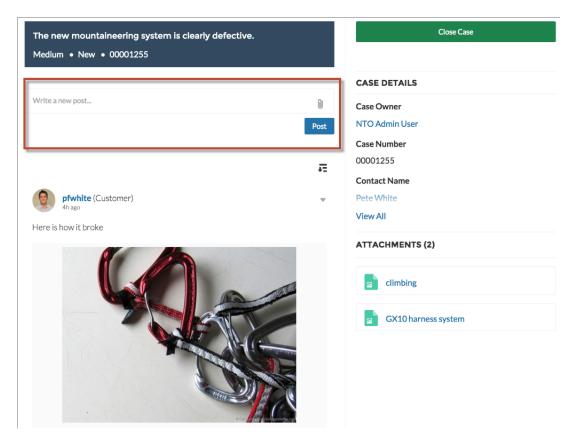
# Important:

Make sure to enable the community case feed so users see supported case interactions in their feed. For details, see Set Up
the Community Case Feed.

- If an agent posts on a customer's case within a community built using the Customer Service (Napili) template, the post is only visible to other internal users. To ensure that customers see agent posts, agents should use the Community action in the console.
- 1. Select the Case Feed Publisher component in the page that you're configuring.
- **2.** In the property editor, configure properties for the component:

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

**Example:** Sample Case Feed Publisher component:



SEE ALSO:

Which Components Can I Use with Each Template?

### Case List

The Case List component displays a list of the user's cases. Only authenticated users can see a list of the cases that they've created.



You can select the fields to display by editing the Cases list view.

- Note: The name of the first column in Case List displays as the case title on mobile devices. We recommend using Subject as the first column so mobile users can easily scan their cases. To change the column order in the Case List component, edit the case list view that your organization has assigned to it. By default, the Case List component uses the All Open Cases list view from Salesforce.
- 1. Select the **Case List** component in the page you're configuring.
- 2. In the property editor, configure properties for the component:

Property	Details
Case Filter Name or ID	Enter the name of the list view that displays cases.
	Note: By default, the template uses the AllOpenCases view, which lets users view any open cases that they have permission to see. Configure sharing to ensure that users see only cases that belong to them. Alternatively, you can use another pre-defined list view or create a custom list view.
Header Title	Enter the text for the label that appears at the top of the list of cases. The default for this field is My Cases.
Create Case Label	Enter the text you'd like to display on the button that users can click to create a case. The default text is Create Case.



### Example: Sample Case List component:

ACTIVITY CA	SES					
MY CASES						Create Case
Case Number	Contact Name	Subject	Status	Priority	Date/Time Opened	Case Owner Alias
00001256	Pete White	Rain fly coming loose	New	Medium	3/27/2015 9:26 AM	NUser
00001255	Pete White	The new mountaineering sy	New	Medium	3/26/2015 10:33 PM	NUser
00001254	Pete White	What do you recommend fo	New	Medium	3/26/2015 3:56 PM	NUser
00001253	Pete White	Down leak from sleeping ba	New	Medium	3/26/2015 3:20 PM	NUser

SEE ALSO:

Which Components Can I Use with Each Template?

# **Category Filter**

The Category Filter component lets users filter the article list based on selected data categories so that they can see articles from those categories only.

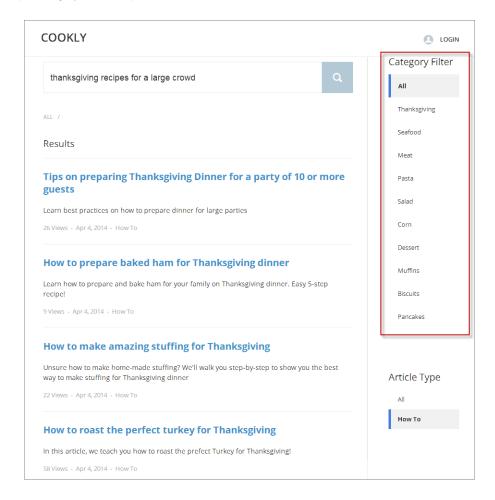
Users can filter the Article View by selecting one or more data categories.

- 1. Select the Category Filter component in the page you're configuring.
- **2.** In the property editor, configure properties for the component:

Category Name  The top-level category that contains the subcategories for articles is automatically set using an expression that uses the top-level category you specified in the template's Custom Properties.	Property	Details
	Category Name	an expression that uses the top-level category you specified in the template's Custom

**(1)** 

**Example:** Sample Category Filter component:



SEE ALSO:

Which Components Can I Use with Each Template?

# **Category Navigation**

The Category Navigation component shows a list of child categories for a selected parent category.

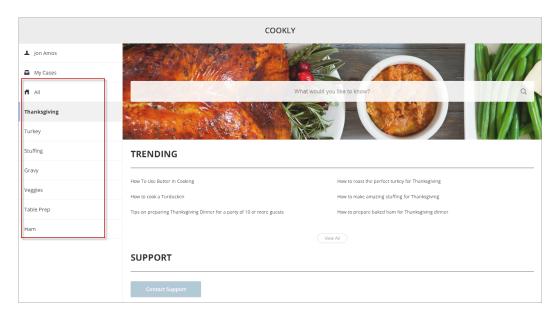
Users can click the child category to view the articles that are associated with it. For long lists of categories, users can view all of the categories and collapse the list to show fewer categories.

- 1. Select the **Category Navigation** component in the page you're configuring.
- 2. In the property editor, configure properties for the component:

Property	Details
Category Name	The top-level category that contains the subcategories for articles is automatically set using an expression that uses the top-level category you specified in the template's Custom Properties.

Property	Details
Auto-Collapse	Select the checkbox to have the category navigation component collapse automatically after a category is selected.

**Example:** Sample Category Navigation component:



### SEE ALSO:

Which Components Can I Use with Each Template?

# **Contact Support & Ask Buttons**

The Contact Support & Ask Buttons component adds two buttons to the page: one that lets users click a button to create a case, and another that allows members ask a question and publish it to the community. When you enable Web-to-Case and set up a guest user case publishing action, guest users aren't required to log in before creating a case. All members must be logged in to ask the community a question.



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

- 1. Select the **Contact Support & Ask Buttons** component in the page you're configuring.
- **2.** In the property editor, configure properties for the component:

Property	Details	
Header Label	The text you'd like to display at the top of the component.	
Ask Community Label	The text you'd like to display on the button that members can click to ask a question from the community. The default text is Ask a Question.	

Property	Details
Contact Support Label	The text you'd like to display on the button that users can click to create a case. The default text is Contact Support.



Example: Sample Contact Support & Ask Buttons component:



### SEE ALSO:

Which Components Can I Use with Each Template?

# **Contact Support & Ask Buttons**

The Contact Support & Ask Buttons component includes two buttons, one to ask a question of the community, and another to contact support by creating a case.



Note: Before Spring '16, this component was named Call to Action.

When you enable Web-to-Case and set up a guest user case publishing action, guest users aren't required to log in before creating a case.



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

- 1. Select the **Contact Support & Ask Buttons** component in the page you're configuring.
- **2.** In the property editor, configure properties for the component:

Property	Details
Header Label	Text that displays at the top of the section that includes both buttons. The default text is Don't see what you're looking for?.
Ask Community Label	Text that appears on the button users click to start discussions in the community. The default text is Ask A Question.
Contact Support Label	Text that displays on the button that users click to contact support by creating a case. The default text is Contact Support.



**Example**: Sample Contact Support & Ask Buttons component:



SEE ALSO:

Which Components Can I Use with Each Template?

### Create Case Form

The Create Case Form component searches text as it's being entered into a case and displays articles based on the typed text. If users don't see an answer, they can contact support for help. You can also protect your community from spammers by adding a reCAPTCHA widget that guest users must complete before they create a case.

Before Spring '16, this component was named Case Creation.



Note: When you configure the case page layout for your community, specify that some fields are required. Adding required fields to the layout ensures that customers don't accidentally submit cases with empty fields.

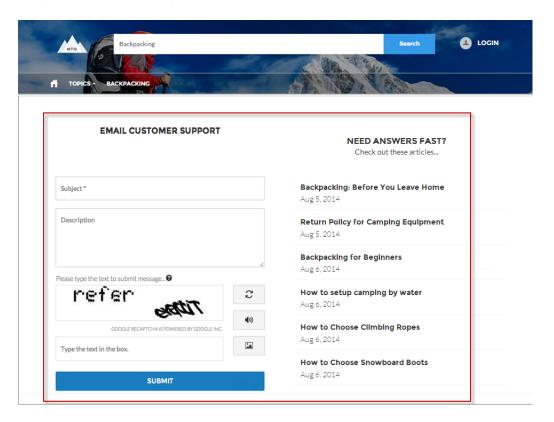
- 1. Select the **Create Case Form** component in the page you're configuring.
- **2.** In the property editor, configure properties for the component:

Property	Details
General Settings	Click to expand the section with general setting properties.
Attach Files	Lets authenticated users attach a file to the comment in the case. Your organization's settings control the limits for file sizes. If you enable Web-to-Case to let guest users create cases, keep in mind that guest users can't attach files to a case.
Header Title	Text that displays at the top of the page customers use to create a case. The default is Email Customer Support.
Confirmation Message Title	Text that appears as the title of the message confirming that the case has been created. The default is: Your request was submitted successfully.
Confirmation Message Description	Text that appears as the body of the message confirming that the case has been created. For example, You'll hear back from us soon.
Actions in the Publisher	Click to expand the section with action properties.
Signed-In User Case Action	The name of the action that creates cases for authenticated users. Use the action layout editor for the case object in Salesforce setup to specify which fields to include in the layout. The NewCase action is a default in your Salesforce org.
Guest User Case Action	The name of the action that creates cases for unauthenticated users. Use the action layout editor for the case object in Salesforce setup to specify which fields to include in the layout.
Case Deflection	Click to expand the section with case deflection properties.

Property	Details
Use Case Text to Suggest Articles	Uses the text users type in the case title and description fields to suggest articles in the deflection area of the page. Article deflection appears only when you've implemented Salesforce Knowledge in your org.
Number of Articles	Number of articles that display in the component.
Top-Level Category	Top-level data category for template-driven communities using data categories.
Category Group name for article deflection	Data category group name for template-driven communities using data categories.
Deflection Banner Text	Text that displays as the title of the deflection area of the page. The default is Need Answers Fast?.
Deflection Text	Text that displays as the subtitle in the deflection area of the page.
Mobile-Only Deflection Text	Text that displays in the deflection area for users of mobile devices.
reCAPTCHA Settings	Click to expand the section with reCAPTCHA settings.
reCAPTCHA for Guest Case Creation	Adds the reCAPTCHA widget to your page. The reCAPTCHA widget requires guest users to complete a text field successfully before they can create a case.
	Note: To use Google's reCAPTCHA service, go to the Google reCAPTCHA website, register your domain, and receive a secret and site key pair. For details on which languages are supported in the widget, see the reCAPTCHA website. Google reCAPTCHA is a resource provided by Salesforce to support its users and partners, but is not considered part of our Services for purposes of the salesforce.com Master Subscription Agreement.
Secret Key for reCAPTCHA	Enter the key that you received when you registered for the service.
Site Key for reCAPTCHA	Enter the key that you received when you registered for the service.
	Note: Make sure that you thoroughly test the reCAPTCHA widget in your production organization.

**(1)** 

**Example**: Sample Create Case Form component:



SEE ALSO:

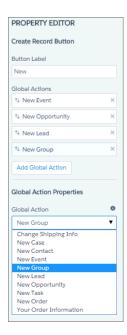
Which Components Can I Use with Each Template?

### Create Record Button

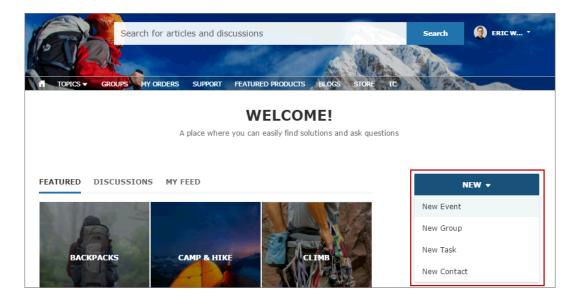
Use the Create Record Button component to allow community members to create records using global actions.

This component relies on the global actions defined in your org by the administrator. If you associate more than one action with this button, it acts like a drop-down list. When a community member selects an action from the list, the Create Record page dynamically loads the appropriate action layout for that action using the Create Record Form component.

- 1. Add the **Create Record Button** component to a page or select it on the page you're configuring. For example, you could add this to the Home page to make it easy for community members to find.
- 2. Click Add Global Action to add an action to the Global Actions list.
- 3. Select each action and modify its type and public availability in the Global Action Properties section below.
  - Select the global action type to be associated with each action in the Global Actions list.
  - Select Publicly Accessible to make that action available for guest users in the community.



**Example:** Sample Create Record Button component on a community home page.



## Create Record Form

The Create Record Form component displays the action layout when a user clicks an action from the Create Record button.

When a community member clicks an action from the Create Record button in your community, they're redirected to the Create Record page, which uses the Create Record Form component to display the fields in the associated global action layout. The page and component automatically pick up the global action layout defined in Setup based on the clicked action and the Action Name property is automatically populated. No additional configuration is required.



**Example**: Sample Create Record Form component.



# **Custom Lightning Components**

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

To use custom Lightning components in your community:

- Enable Lightning components. To do so, from Setup, enter Lightning Components in the Quick Find box, select Lightning Components, and then select Enable Lightning Components.
- Implement each component from the Developer Console as shown in this example:
  - <aura:component
    implements="forceCommunity:availableForAllPageTypes"
    access="global">
- To make the component's properties editable in Community Builder, include a design resource named componentName.design with your Lightning component bundle.
  - Note: For help with developing custom Lightning components, see the Lightning Components Developer's Guide and the Lightning Components Cheat Sheet.

Custom Lightning components behave just like community template components. Drag and drop
the component to the page canvas. To edit its properties, select the component on the page canvas, and then enter changes in the floating component property editor.

Custom components appear in the Components panel along with your template's components.

### **EDITIONS**

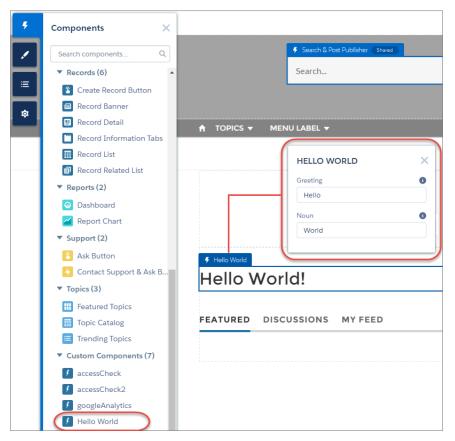
Available in: Salesforce Classic and Lightning Experience

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

# USER PERMISSIONS

To customize or publish a community:

"Create and Set Up Communities" **Example**: A custom component added to the page canvas, with properties open in the floating component property editor:



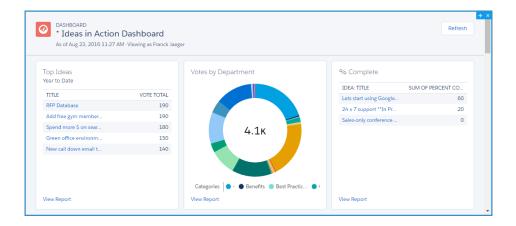
## Dashboard

Use the Dashboard component to drag and drop dashboards you set up in your org's public folder to your community's pages.

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

Property	Details
Dashboard Name	Select an available dashboard.
Height	Adjust the height of the dashboard. Column width controls the dashboard width.

**Example:** Sample Dashboard component:



Note: Members can't change the dashboard's running user in the community. This view is read only.

### Dashboard List

The Dashboard List component lets users view dashboards in list form.

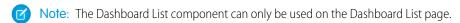
The dashboard list can be filtered with these criteria:

- Recent
- Created by Me
- Private Dashboards
- All Dashboards

In addition, users have access to dashboard folders. Folders include:

- Created by Me
- Shared with Me
- All Folders

The Dashboard List component doesn't have any editable properties.



**Example**: Sample Dashboard List component:

[insert image]

# **Expanded Category Navigation**

The Expanded Category Navigation component organizes articles based on a hierarchy of categories.

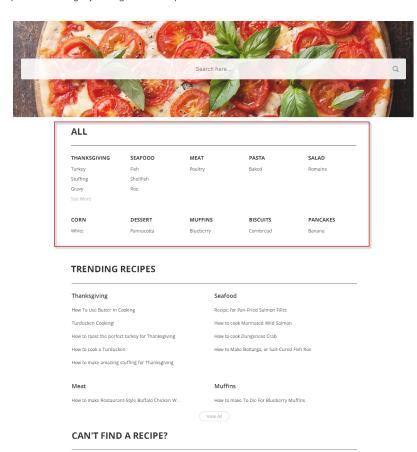
Users can select a top-level category and then view the related categories and subcategories as they're browsing for articles. Then they can click the child category to view the articles that are associated with it. For long lists of categories, users can expand the list to view all of the categories and then collapse it to make it more compact.

- 1. Select the **Expanded Category Navigation** component in the page you're configuring.
- 2. In the property editor, configure properties for the component:

Property	Details
Category Name	The top-level category that contains the subcategories for articles is automatically set using an expression that uses the top-level category you specified in the template's Custom Properties.
Title	If you'd like to display another name for the top-level data category, enter the text in this field. For example, if the top-level category name is <code>Desserts</code> , you can change the text to <code>Easy Dessert Recipes</code> . The text you enter in this field appears only as the title of the page. You aren't changing the name of the category in navigation breadcrumbs or anywhere else
Max Number of Sub-Categories	Specify the to limit the number of child categories to display for each parent category. The default is 3.
Max Number of Categories	Specify the maximum number of parent categories to display in the page. The default is 10, but there is no restriction on the number of parent categories you can display.



**Example:** Sample Expanded Category Navigation component:



SEE ALSO:

Which Components Can I Use with Each Template?

# **Featured Data Categories**

The Featured Data Categories component displays a group of data categories, with an image and title showing for each data category within the specified group.

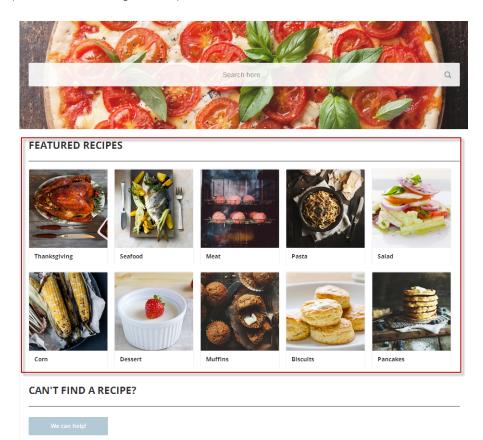
Images help your users select which group of articles they'd like to browse. You can set properties to choose the number of categories displayed on the page.

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

Property	Details
Number of Data Categories	Type the number of data categories to display from the group. Categories display in the order listed in the data categories group.

Property	Details
Category Image URL	Specify the URL to display the image associated with each data category. To automatically display the image for your data categories, type { !Global.PathPrefix}/{!DataCategory.Name}.jpg in the text box. The recommended size for this image is 220 x 220 pixels.
Title	Enter the title text for the list of featured data categories.

**Example:** Sample Featured Data Categories component:



SEE ALSO:

Which Components Can I Use with Each Template?

## **Featured Search**

The Featured Search component lets your users search for articles within a specified data category.

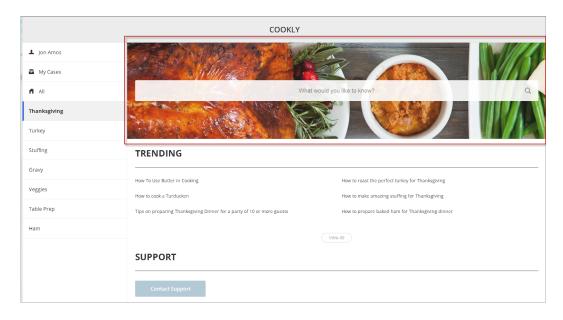
When a user types in the search text box, the system returns articles and search strings based on matches with the characters being typed. You can customize the search to display an image for the data category in which the user is searching.

1. Select the **Featured Search** component in the page you're configuring.

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

Property	Details
Placeholder Text	Enter the text that appears in the search bar. The default text is What would you like to know?
Category Name	The top-level category that contains the subcategories for articles is automatically set using an expression that uses the top-level category you specified in the template's Custom Properties.
Disable Background Image	Select the checkbox if you don't want to display the background image for the category. The search box becomes smaller and more compact.
Max Number of Auto Query Suggestions	Enter the number of search queries to return per match.
Max Number of Article Title Match Results	Enter the maximum number of articles to return per match.
Category Image URL	Specify the URL to display the image associated with each data category. To display the image for your data categories, type { !Global.PathPrefix} / { !DataCategory.Name}.jpg in the text box. The recommended size for this image is 1220 x 175 pixels.

**Example:** Sample Featured Search component:



### SEE ALSO:

Which Components Can I Use with Each Template?

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

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

Incremental searching gives users immediate results and helps them find the most relevant articles or popular search terms as they type their search string. The user can use the Tab or Arrow keys to display the first suggestion or select on any of the returned results to view that article.



The system queries for public knowledge articles that exist within the channel by which you've made the articles available. So if the user has access to the public knowledge base, only those articles appear in the search. Articles appear in the language that you've selected for the community.

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

## **Featured Topics**

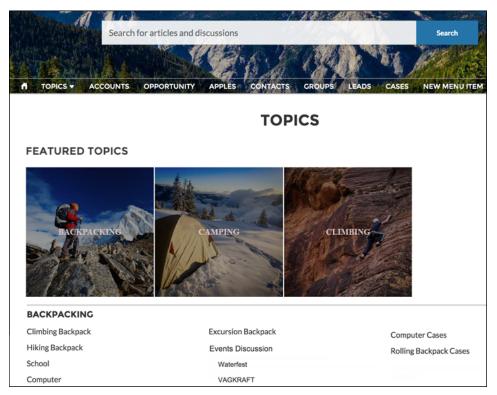
The Featured Topics component gives you the freedom to display your community's designated featured topics, and the images that represents them, on any community page by simply dragging and dropping.

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

Property	Details
Title	Enter a title for the list of featured topics. The default text is Featured Topics.
Show Title	Check to show the title.



**Example**: Featured Topics on the Topic Catalog page.



### Feed

The Feed component displays a feed of all record or group interactions, including posts, questions, and attachments.

Use the Feed component in the Customer Service (Napili) template to add a feed to a record, a topic, a group, a user profile, or an overall community discussion. The component provides a chronological, filterable list of posts made with the Feed Publisher component. Users who click a post's timestamp are directed to an expanded view, which shows the post and all its related comments.



Note: The Feed component isn't supported for articles.

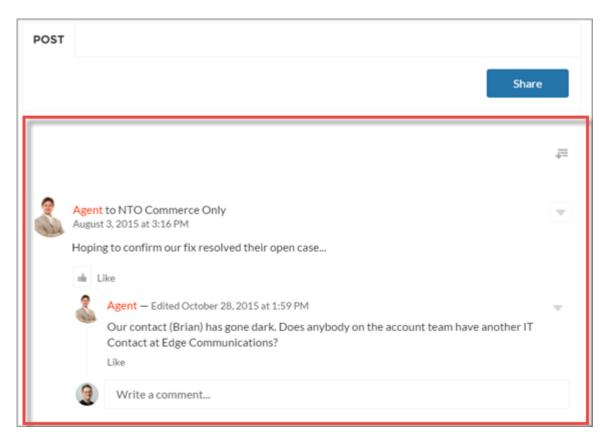
Comments and attachments on posts appear inline below the post for desktop and tablet users.

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

Property	Details
Feed Type	Select the type of feed you'd like to place on your page.
Record ID	The feed item ID. Typically, this field is automatically populated when the page loads. Leave this field blank if you pick the Community Discussion or My Feed options in Feed Type.
Default Feed Filter	For feed entries you want your community members to see, select the default filter.
Post Style	Choose whether to expand or collapse post comments by default.



**Example:** Sample Feed component



SEE ALSO:

Which Components Can I Use with Each Template?

# **Feed Compact**

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



Note: The Feed Compact component displays only question posts, it doesn't support feed filters, nor is it supported for articles.

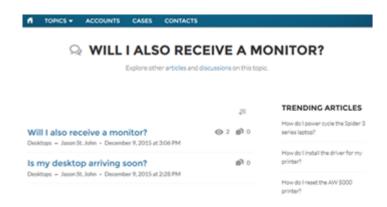
Clicking a post directs users to the expanded post and all its related comments.

- 1. Select the **Feed Compact** component in the page you're configuring.
- 2. In the property editor, configure properties for the component:

Property	Details
Show Views	Select to show the number of times an item is viewed $_{\odot 2}$ . A view is counted when an item is liked, commented on, or its detail view is opened. Clear to hide the view count.
Show Likes	Select to show the number of likes for each post. Clear to hide the number of likes.

Property	Details
Show Comments	Select to show the number of comments for each post. Clear to hide the number of comments.
Compact Feed Type	Select the object or context you want to associate this feed with.
Entity Id	The feed item ID. Typically, this field is automatically populated when the page loads. Leave this field blank if you pick the Community Discussion or My Feed options in Compact Feed Type.





SEE ALSO:

Which Components Can I Use with Each Template?

### Feed Post & Comments

The Feed Post & Comments component shows the detailed view of an individual post, comment, or question in the community feed. For questions, it includes the question, all the answers to that question, and an indication if it was escalated to a case.



Note: Before Spring '16, this component was named Feed Item Detail.

Only users who are logged in can post an answer to a question. Users can attach a file to a question or answer post by clicking the paperclip icon. They can choose to **Select a File** from files already uploaded to the community or **Upload a File** from the user's local drive.

Once an answer is posted, users can click 🕙 at the top right corner of the post to edit, bookmark, delete, or flag the post. Also, users can edit the topics associated with the post. The editing and flagging features must be enabled for the community. Users in Koa and Kokua communities can only access the Feed Post & Comments component if the community case feed is enabled.

1. Select the **Feed Post & Comments** component in the page you're configuring. There are no properties to set for this component.

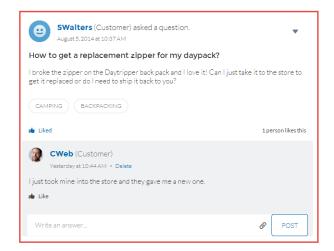


**Example:** Sample Feed Post & Comments component:



# → HOW TO GET A REPLACEMENT ZIPPER FOR MY DAYPACK?

Explore other articles and discussions on this topic.



# TRENDING ARTICLES Backpacking: Before You Leave... Return Policy for Camping Equ... Backpacking for Beginners How to setup camping by water How to Choose Snowboard Bo...

SEE ALSO:

Which Components Can I Use with Each Template?

### Feed Publisher

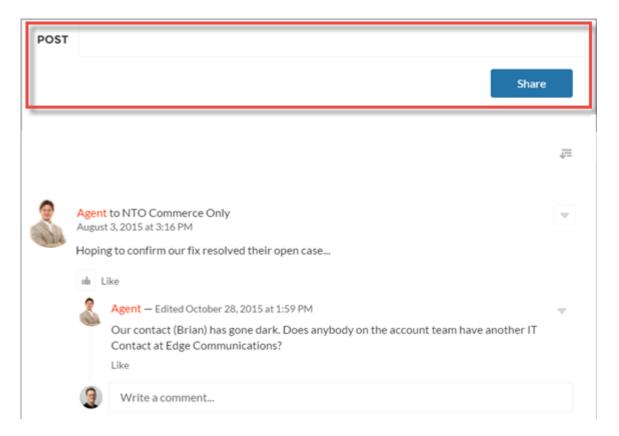
The Feed Publisher component lets customers create rich text posts on records, groups, topics, and profiles, and attach files from any of their devices. It also supports multiple file attachments, inline images, and rich link previews. The Feed Publisher component isn't supported for articles.

When community members create posts using the Feed Publisher, the posts are displayed in the related Feed or Feed Compact component for the page. By default, you can attach any supported file type up to 2 GB per file. For best performance, inline images up to 25 MB per image are recommended. Inline images over 25 MB display at full size, and may be slow to load.

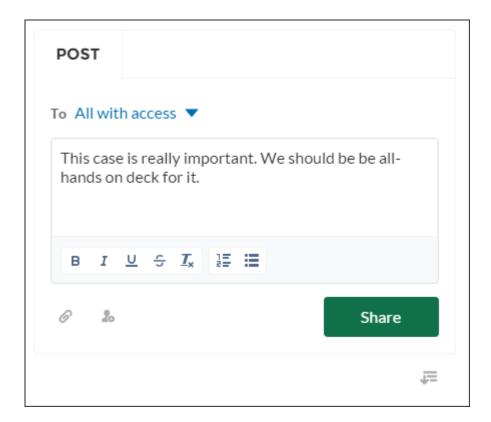
- 1. Select the **Feed Publisher** component in the page you're configuring.
- 2. In the property editor, configure properties for the component:

Property	Details
Туре	Select the type of feed publisher you'd like to place on your page. To use global publisher actions defined in your Salesforce organization, choose Global. To use an object-specific publisher layout, choose Record.
	For example, use Record if you want to add the publisher to a custom group detail page and use the publisher actions included in the group publisher layout for your org.
Record ID	The feed item ID. Typically, this field is automatically populated with the record ID when the page loads. Leave this field blank if you pick the Global feed publisher type.
Publisher Layout Design	Choose if you'd like to see the wide or narrow feed publisher layout design.

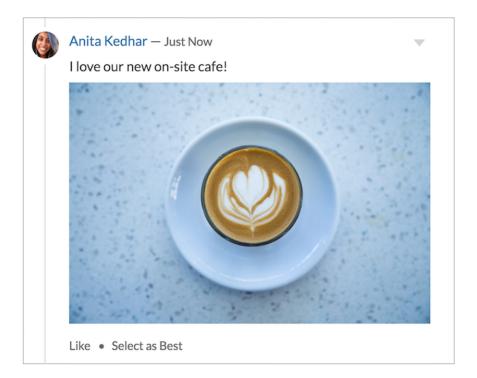
Example: Sample Feed Publisher component, wide layout



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



**Example:** Sample feed post with inline image



SEE ALSO:

Which Components Can I Use with Each Template?

### **Files List**

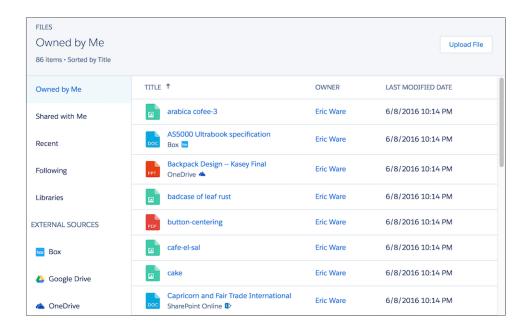
Use the Files List component in the Customer Service (Napili) template to give community members a convenient place to view and manage their files.

Members can upload, sort, and filter files using the files list. Clicking a file opens the file previewer, where members can upload a new version, download, and delete the file. Filters in the left sidebar show different selections of files. The Libraries filter shows files from Salesforce CRM Content libraries, and Files Connect users can see their external libraries under External Sources.

- 1. Select the **Files List** component in the page you're configuring.
- 2. In the property editor, configure properties for the component:

Pro	operty	Details
Fi	les List	Modify the number of records that display in the window, from 10 to 100. A scrollbar appears to let users scroll to see more records

**Example**: Sample Files List component, wide layout



## **Follow Button**

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

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

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

Property	Details
Followed Record ID	The system supplies this value. Don't update this field.



Example: Sample Follow Button component:



SEE ALSO:

Which Components Can I Use with Each Template?

## Global Search Results

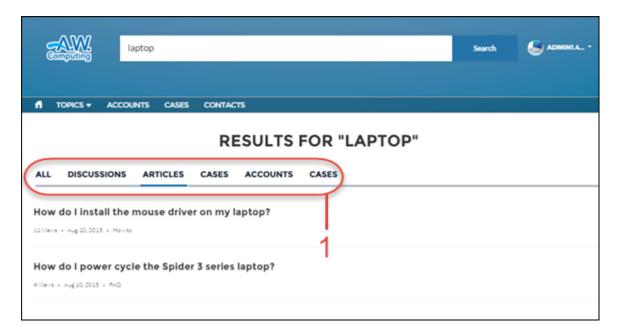
The Global Search Results component displays search results from across the community. The results shown are based on search terms entered in the Search Publisher and can be displayed in one list or in multiple tabs.

- 1. Select the **Global Search** component.
- **2.** In the property editor, configure properties for the component:

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

(1) Important: To allow your users to find a custom object's records when they search, in Salesforce setup create a custom tab set to Default On or Default Off. Creating a custom tab enables the custom object's Allow Search setting.

**Example:** Global Search Results shown in the community:



# Group

The Group component displays all the content in a group using a single composite component. It includes the group banner, which includes the member and owner actions, the group feed, description, and related lists (group members and files).

When you add groups to your community navigation menu, clicking the Groups item directs community members to a list of groups. Clicking a group in the group list loads the Group Detail page, which uses this component by default.



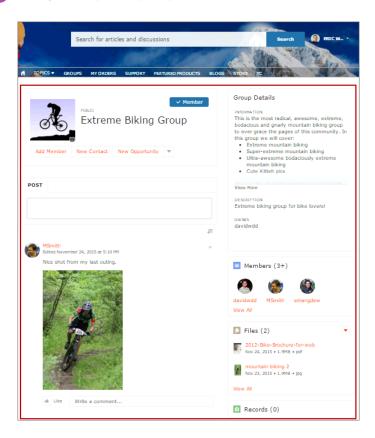
### Note:

- Add the Add Member action to the group publisher for users to access it from the banner.
- For optimal display, choose a wide column width when using this component on a custom page.
- 1. Select the **Group** component on the page you're configuring. By default, this component is located on the Group Detail page.
  - Note: You must have at least one group in your community to view the Group Detail page and modify its components.
- **2.** In the property editor, configure properties for the component:

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

**(1)** 

**Example:** Sample Group component:



Note: The Group component is optimized to be responsive across all devices. If you want more control over the placement of group content, you can use separate components to create a custom layout. Use the Group Banner, Group Detail, Group Related List, Feed Publisher, and the Feed or Feed Compact components to create a custom group page. However, creating a custom group page does not guarantee optimal display and responsiveness across desktop and mobile devices.

### SEE ALSO:

Which Components Can I Use with Each Template?

# **Group Banner**

Use the Group Banner component on custom group detail pages for your community. This component displays the group name, the group photo, the Join Group and Leave Group buttons, and other action buttons for group owners, managers, and members.

Use the Group Banner component with the Group Detail, Group Related List, Feed Publisher, and the Feed or Feed Compact components to create a custom group detail page. Creating a custom group detail page does not guarantee optimal display and responsiveness across all desktop and mobile devices. We recommend using the Group component instead, which is a single composite component that displays all of this content.



### Note:

- Add the Add Member action to the group publisher for users to access it from the banner.
- For optimal display, choose a wide column width when using this component.

- 1. Select the **Group Banner** component on the page you're configuring.
- 2. In the property editor, configure properties for the component:

Property	Details
Group ID	The ID of the group. This value is automatically populated when the group is displayed.

**Sample Group Banner component** 



SEE ALSO:

Which Components Can I Use with Each Template?

# **Group Detail**

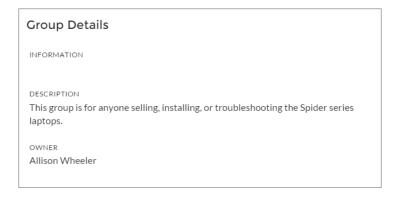
Use the Group Detail component on custom group detail pages for your community. This component displays the content from the group description and information fields along with the name of the group owner.

Use the Group Detail component with the Group Banner, Group Related List, Feed Publisher, and the Feed or Feed Compact components to create a custom group detail page. Creating a custom group detail page does not guarantee optimal display and responsiveness across all desktop and mobile devices. We recommend using the Group component instead, which is a single composite component that displays all of this content.

- 1. Select the **Group Detail** component on the page you're configuring.
- **2.** In the property editor, configure properties for the component:

Property	Details
Group ID	The ID of the group. This value is automatically populated when the group is displayed.
Header label	The label for the group details section. Affects both the desktop and mobile view.

Example: Sample Group Detail component



### SEE ALSO:

Which Components Can I Use with Each Template?

# **Group Related List**

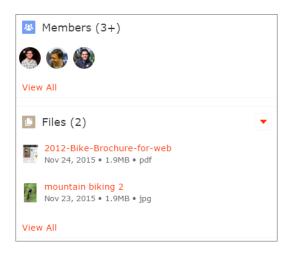
Use the Group Related List component on custom group detail pages for your community. This component displays the group files, members, and records.

Use the Group Related List component with the Group Banner, Group Detail, Feed Publisher, and the Feed or Feed Compact components to create a custom group detail page. Creating a custom group detail page does not guarantee optimal display and responsiveness across all desktop and mobile devices. We recommend using the Group component instead, which is a single composite component that displays all of this content.

- 1. Select the **Group Related List** component on the page you're configuring.
- **2.** In the property editor, configure properties for the component:

Property	Details
Group ID	The ID of the group. This value is automatically populated when the group is displayed.

# Example: Sample Group Related List component



SEE ALSO:

Which Components Can I Use with Each Template?

# Headline

The Headline component gives you customizable headline text and text banner with inline links to pages that show discussions, topics, and articles. It also displays an icon to the left of the banner that identifies the content as an article or a discussion when either is selected.

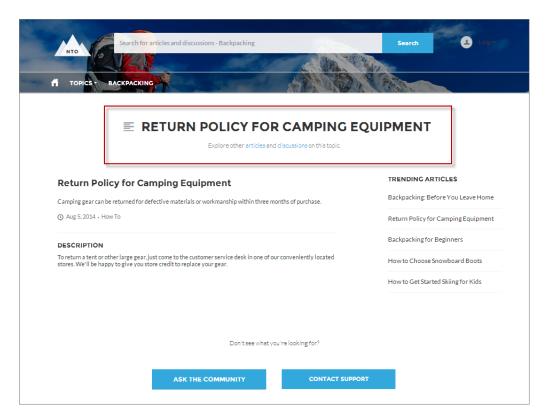
- 1. Select the **Headline** component in the page you're configuring.
- **2.** In the property editor, configure properties for the component:

Property	Details
Title	Enter the static text for the page's headline. The default text for the page is Welcome!.
Banner Text	Enter the static text that appears on the home page. The default text is A place where you can easily find solutions and ask questions.
Page Type	Enter the type of content that the page displays in this page. Type either <code>article</code> , <code>topic</code> , or <code>discussion</code> to retrieve the title of the page and display an icon identifying the type of page the user is viewing.
Unique Name or ID	The system retrieves the ID from the URL of the question or article when it's selected.
Banner Text with Articles and Discussions	Enter the static text and link text that lets users select a page that shows articles or discussions. This text and links in this field appear on the page when Salesforce Knowledge is enabled and set up in your organization. You can translate and change the value of each component, but not the position of the component.
	<pre>Explore other <a class="headlineArticles" href="javascript:void(0)">articles</a> and <a class="headlineDiscussions" href="javascript:void(0)">discussions</a> on this topic</pre>
Banner Text with Discussions	Enter the static text and link text that lets users select a page that shows discussions only. This text and link in this field appear on the page when Salesforce Knowledge isn't enabled in your organization. You can translate and change the value of each component, but not the position of the component.
	<pre>Explore other <a class="headlineDiscussions" href="javascript:void(0)">discussions</a> on this topic</pre>
Show Subtopics	Below the headline, displays links to topics that are children of the current topic. (On mobile devices, these links appear in a Subtopics menu.)
	Only navigational topics support parent-child relationships.

If you have set up navigational subtopics, change the following properties in the property editor to populate topic and subtopics dynamically on the topic detail page:

Property	Details
Title	Enter {!topicName} to retrieve and display the topic name on the topic detail page.
Page Type	Enter topic as the page type.
Show Subtopics	Select this option to display subtopics.

**Example**: Sample Headline component:



### SEE ALSO:

Which Components Can I Use with Each Template?

# Featured Topics & Feeds

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

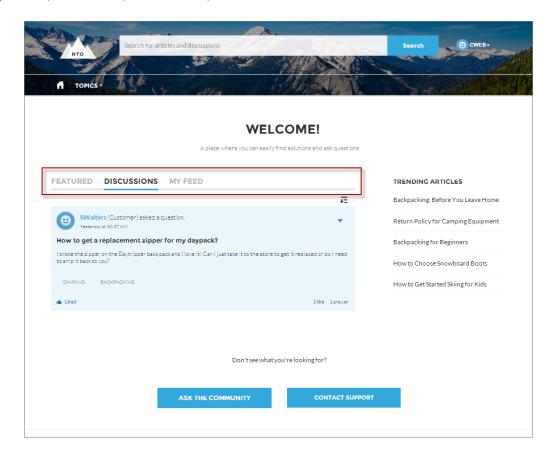


Note: Before Summer '16, this component was named Home Page Tabs.

- 1. Select the **Featured Topics & Feeds** component in the page you're configuring.
- 2. In the property editor, configure properties for the component:

Property	Details
Featured Tab Label	Enter the text you'd like to display on the tab that users select to show topics. The default text is Featured.
Discussions Label	Enter the text you'd like to display on the tab that users select to show discussions. The default text is Discussions.
My Feed Label	Enter the text you'd like to display on the tab that users select to show their feed. The default text is My Feed.
Compact Feed in Discussion Tab	Select to use the compact version of the feed in the Discussions tab. Compact feeds show only question titles and make it easier for users to scan the feed. Compact feeds don't support filters.

**Example:** Sample Featured Topics & Feeds component:



### SEE ALSO:

Which Components Can I Use with Each Template?

# Knowledgeable People

Highlight topic experts so the community can direct questions straight to them. The Knowledgeable People component displays up to five experts, chosen based on factors such as best answers, mentions, or likes on questions and posts.

In the Page Editor, you can configure the Knowledgeable People component on Topic View pages.

- 1. Select the **Knowledgeable People** component.
- 2. In the property editor, configure properties for the component:

Property	Details
Title	Enter a title for the component. The default text is Knowledgeable People.
Topic ID	The default entry, { ! topicId}, displays unique knowledgeable users for each topic. To instead display knowledgeable users based on a specific topic, enter the topic ID.





For communities created in Spring '15 or earlier, complete these steps to add the Knowledgeable People component:

- **1.** From the community, click in the global header.
- 2. Click Administration > Preferences, and select Enable knowledgeable people on topics.
- **3.** Click **Administration** > **Pages**, and go to Site.com Studio.
- **4.** In the Site Pages section, double-click the **main** page.
- 5. In the Views tab at left, double-click **Customer Service (Napili) Topic View**.
- 6. Click the Page Elements tab 🗼 , and search for the Knowledgeable People component.
- 7. Right-click the component, and place it in the div.cSecondaryContent section.

SEE ALSO:

Which Components Can I Use with Each Template?

# Language Picker

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

You can add the language picker to the header or footer, or to any section of any page; it's not included on any pages by default. Only quest users see the language picker. For authenticated users, the community automatically displays in their profile language. For quest

users, the community displays in the community default language. Customized labels and knowledge articles use the translations added by the community admin in Translation Workbench.

If the guest user wants to view the community in a different language, they can select their preferred language using the language picker. The language picker shows all languages supported in the community. When the user selects a language, the page reloads in that language.

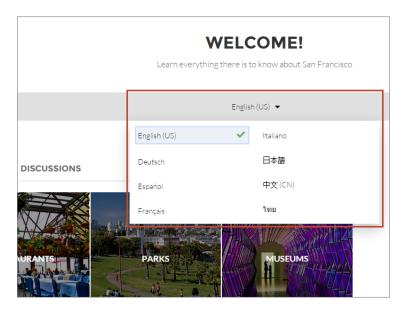


### Note:

- The Language pane in Site.com Studio shows the default language and the list of languages supported in the community. If no languages apart from the default language have been set in Site.com Studio, the language picker shows the default language without a drop-down option. To learn more about setting site languages in Site.com Studio, see Create a Multilingual Site.
- To see the list of languages that guest users see, go to the Branding Editor in Community Builder. Make sure you're on a page that contains the language picker. Then click the drop-down icon on the language picker.
- 1. Select the Language Picker component in the page you're configuring.
- 2. In the property editor, configure properties for the component:

Property	Details
Alignment (Left, Center, or Right)	To specify how the language picker is aligned on the page, enter $Left$ , $Center$ , or $Right$ . The default value is $Center$ .

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



### SEE ALSO:

Which Components Can I Use with Each Template?

# Message Notification

Add the Message Notification component to your community pages to let users view their recent messages from outside the Messages list view. The Message Notification component shows up to three recent messages and allows users to send new messages.

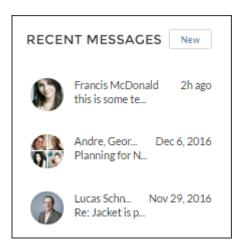
Add the Message Notification component to the community Home page and configure it in the Page Editor.

- 1. Select the Message Notification component.
- **2.** In the property editor, configure properties for the component:

Property	Details
Header Label	Enter a title for the component. The default text is Recent Messages.



**Example**: Sample Message Notification component:



SEE ALSO:

Which Components Can I Use with Each Template?

# **Navigation Bar**

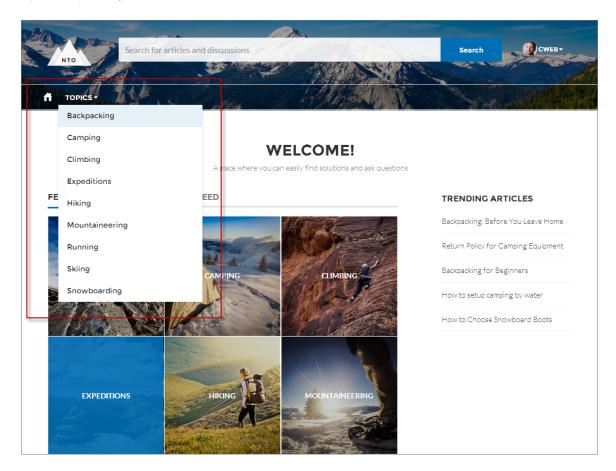
The Navigation Bar component lets users select different topics to browse and provides navigation back to the community home page. If your Customer Service (Napili) template version is Winter '16 or later, this component is replaced with the Navigation Menu component.

- 1. Select the Navigation Bar component in the page you're configuring.
- 2. In the property editor, configure properties for the component:

Property	Details
Topic Menu Label	Enter the text you want to appear as the label for the drop-down list of topics that appears in the navigation bar.

**(1)** 

**Example:** Sample Navigation Bar component:



SEE ALSO:

Which Components Can I Use with Each Template?

# Navigation Menu

The navigation menu component extends your community's navigation beyond navigational topics. Navigation menu items can include Salesforce objects, topics, pages in your community, URLs to external sites, and menu labels. Menu labels are parent headings under which you can nest other menu items.

When setting up the navigation menu, consider the following:

- Menu item labels must be unique within the community.
- You can add up to 20 navigation menu items. Menu items that don't fit on the first line of the navigation menu appear in a More overflow menu item.
- If you want to map a navigational topic to a menu item, you must first set it up in Community Management.

To create or modify navigation menu items:

- 1. Select the **Navigation Menu** component in the page you're configuring.
- 2. In the property editor, click **Navigation Menu**.

  In the menu editor overlay, you can edit or delete existing menu items, or add new ones.

- 3. To add a menu item:
  - a. Click Add Menu Item.
  - **b.** Enter the name you want to use in the navigation menu for this item.
  - **c.** Select the type of item you're navigating to.

Options include:

- Community Page—Links to a page inside your community using a relative URL. For example, /contactsupport.
- External URL—Links to a URL outside of your community. For example, http://www.salesforce.com.
- Menu Label—Adds a parent heading for your navigation menu. Nest items underneath the menu label.
- Navigational Topic—A drop-down with links to the navigational topics in your community. Navigational topics are set up in Community Management.
- Salesforce Object—Available objects include accounts, cases, contacts, leads, opportunities, and any custom objects.
  - 1 Tip: Select this option to create a list view page for the selected object. This option is the easiest way to expose Salesforce record data in your community with minimum configuration.
- **d.** Complete the fields based on the type you selected.
  - If you selected Salesforce Object, select the default list view to show.
  - If you selected Community Page, use the drop-down to select the community page you want to link to. The URL field automatically populates the relative URL for the page based on your selection.
  - If you selected External URL, enter the fully qualified URL. To keep navigation within your community, select the Open link in the same tab checkbox.
  - Select **Publicly Available** if you want the navigation menu item to show for guest users that aren't members of the community.
- 4. To move an item, click and drag the item to where you want it to appear in the menu. Nest other menu items underneath a menu label by dragging them to the right under the menu label.
- 5. To delete a menu item, hover over or click the item and click imes .
- **6.** Save your changes.

If your community is already active, you see a Publish Changes button. When you click this button, your new navigation menu changes are immediately visible to community members.

If your community is still in Preview status, you see a Save Changes button. When you click this button, your changes are saved and are visible to your community when you activate it.

**Example:** Sample Navigation Menu component:



On a mobile device, your community navigation menu collapses to better fit your screen.

Sample Navigation Menu component on a mobile device:



If your community hosts users who speak different languages, you can translate your navigation menu using the Translation Workbench. For information on using the Translation Workbench, see "Translate Terms" in the Salesforce help.

SEE ALSO:

Which Components Can I Use with Each Template?

# New Message Button

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

Add the New Message Button component to a community page and configure it in the Page Editor.

- 1. Select the **New Message Button** component.
- **2.** In the property editor, configure properties for the component:

Property	Details
User ID	The ID of the user sending the message. The system automatically detects and populates this value.
Label	Enter a title for the component. The default text is Send Message.



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



SEE ALSO:

Which Components Can I Use with Each Template?

### Path

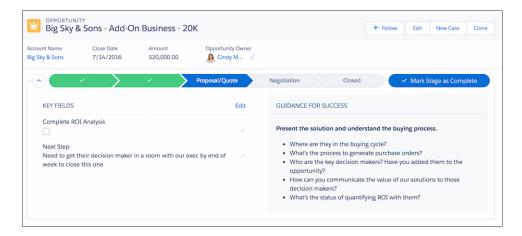
Use this component to guide sales reps through the stages of the sales process and prompt them to enter key field information and record activities. The Path component is used on the Opportunity or Lead record detail pages.

The Path component is intended for a wide-column layout. Add it to columns that are at least 50% wide, though full columns are best.

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

1. Set up the path in the Setup menu.

- a. From Setup, enter Path in the Quick Find box, then select Path Settings.
  - **b.** Click **Enable**, and then click **New Path** to create a path.
- 2. Select the **Path** component in the Opportunity Detail or Lead Detail page you're configuring.
- **Example:** Sample Sales Path component:



SEE ALSO:

Which Components Can I Use with Each Template?

### Profile Header

The Profile Header component displays a user's name (or nickname) and profile picture. It also displays a drop-down that lets users navigate to their profile, open a case, access their locale and email notification settings, or log out of the community. External users can also access and manage their account. If the user isn't logged in, a Login button appears in the header.

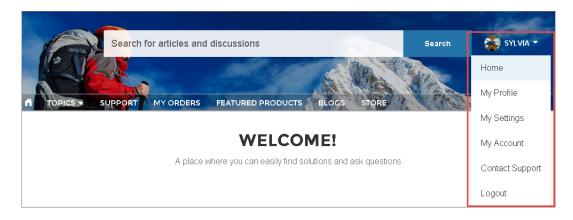
Users can't customize the profile photo functionality in the profile header—they need to edit all profile information from the profile details page.

- Note: If nickname display is enabled in the community, this component shows the nickname instead of the user's name. The user's reputation level displays only if reputation is enabled in the community.
- 1. Select the **Profile Header** component in the page you're configuring.
- 2. In the property editor, configure properties for the component:

Property	Details	
Case Filter Name or ID	The name or ID of the list view that displays the user's cases. This value is used throughout the community to display the user's list of cases.	
	Note: By default, the template uses the AllOpenCases view, which lets users view any open cases that they have permission to see. Configure sharing to ensure that users see only cases that belong to them. Alternatively, you can use another pre-defined list view or create a custom list view.	
Include Contact Support	Select this checkbox to include the option to contact an agent from the profile.	
Home Label	Enter the text you want to show for the link to the community home page from the user navigation menu. The default text is <i>Home</i> .	
View Profile Label	Enter the text you want to show for the link to the profile detail page. The default text is View Profile.	
Contact Support Label	Enter the text you want to show for the link to the page where the user can open a case. The default text is <i>Contact Support</i> .	
Login Label	Enter the text you want to show for the link to log in to the community. The default text is Login.	
Logout Label	Enter the text you want to show for the link to log out from the community. The default text is Log Out.	
Community Management	Enter the text you want to show for the link to the Community Management page. The default text is . This link only appears for users with permissions to manage the community.	
Community Setup Label	Enter the text you want to show for the link to the setup page for communities. The default text is <i>Community Setup</i> . This link is shown to users with permissions to create or modify the community's administration settings.	
User Settings (Customer Service (Napili) template only)	Enter the text you want to show for the link to access an authenticated user's personal settings for the community. The default text is $My$ $Settings$ .	
Show User Settings in Menu (Customer Service (Napili) template only)	Select this checkbox to show user setting in the profile drop-down list.	
My Account Label (Customer Service (Napili) template only)	Enter the text you want to show for the link that external users click to view their account record. The Default text is My Account. This feature is available in the Spring '16 version of the Customer Service (Napili) template and later.	
	Note: External community members who access the My Account link see their account details based on the configuration of the Record Detail page.	



**Example**: Sample Profile Header component:



SEE ALSO:

Which Components Can I Use with Each Template?

## Recommendations

The Recommendations component displays the recommendations for your community.

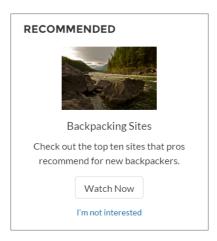
You can configure the Recommendations component in the Page Editor. The component appears on the community page when a custom recommendation or a system-generated topic recommendation is available.

- **1.** Select the **Recommendations** component.
- **2.** In the property editor, configure properties for the component:

Property	Details
Title	Enter a title for the component. The default text is Recommended.
Recommendation Channel	Choose the recommendation channel. The default is <code>Default Channel</code> . To display recommendations that you created in a custom channel, choose that channel.
	Use these channel values; you can't rename or create other channels.



**Example**: Sample Recommendations component:



SEE ALSO:

Which Components Can I Use with Each Template?

### **Record Banner**

The Record Banner component shows the record name, key record highlights, and action buttons that allow users to edit or delete the record.

Before Spring '16, this component was named Record Headline. The Customer Service (Napili) template supports a record detail page that you can use out of the box with no configuration. All objects in your community without a preassigned record detail page use this generic page, called Record Detail, to display record data. For example, consider the scenario where a user lands on a case detail page (that uses a preassigned case detail layout) and clicks a contact in the related records. If you haven't created a custom record detail page for contacts, the contact information is displayed using the generic Record Detail page. Under the hood, the Record Detail page uses the Record Banner component along with the Record Information Tabs component to display record data.

- You can use the Record Banner component on custom record detail pages that you create. We recommend using it with the Record Information component.
- You can modify what fields display in the Record Banner component by customizing the Highlights Panel layout in the object's page layout.
- Community members with the necessary permissions can use the Edit and Delete buttons to modify or delete the record. These buttons don't display on mobile devices.
- Note: For optimal appearance, choose a wide column width when placing this component on your community page.
- 1. From the Page menu in Community Builder, select Record Detail or your custom record detail page.
- 2. Select the **Record Banner** component or drag the component from the Page Editor to the page to add it.
- **3.** In the property editor, configure properties for the component:

Property	Details
Record ID	The ID of the record displayed. Typically, this field is automatically populated.



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



SEE ALSO:

Which Components Can I Use with Each Template?

### **Record Detail**

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

Simply drag the Record Detail component on a record detail or a custom page in the community, and it populates with record information stored in Salesforce. This component is a great way to share information with community members who need it most, like partners. Users accessing the community on a mobile device have access to actions from the record detail page. For example, a partner user with create and edit access to accounts can create accounts or update an account as needed.

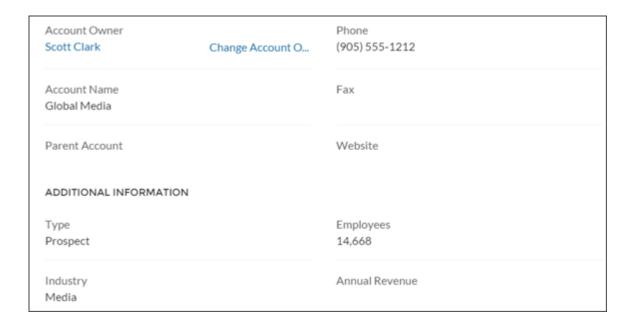


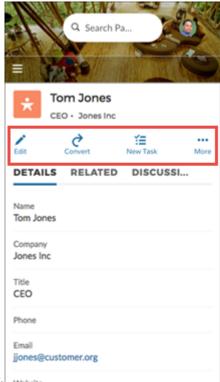
**Note**: To display the record feed, use one the feed components with the feed publisher component. To show the related records, use the Record Related List component. To show a combination of record details, related lists, and the record feed together, we recommend using the composite Record Information Tabs component.

- 1. Select the **Record Detail** component in the page you're configuring.
- 2. In the property editor, configure properties for the component:

Property	Details
Record ID	The record ID. Typically, this field automatically picks up the record ID when the page loads.

**Example**: Example of a Record Detail component on a community.





Example of actions on a mobile device.

## **Record Information Tabs**

The Record Information Tabs component shows detailed record information, lists of related records, and the record feed.

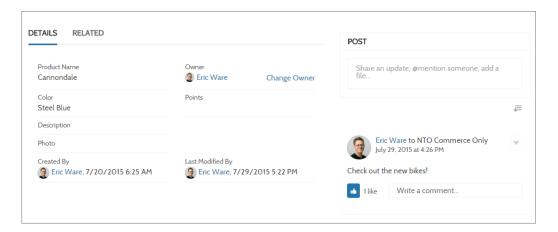
Before Spring '16, this component was called Record Information. The Record Information Tabs component uses the Record Detail Page and the Record Banner component to display record data. Let's dive in and look at it more closely.

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

- You can use the Record Information Tabs component on custom record detail pages that you create. We recommend using it with the Record Banner component.
- You can modify what fields display in the Record Information Tabs component by customizing the object's page layout.
- Community members with permissions can create new related records and send emails from the Related tab. They can also expand
  related record lists to see a longer list. These details are displayed on the generic Record Related List page. These buttons don't
  display on mobile devices.
  - Note: Emails are supported in accounts, contacts, leads, opportunities, and campaigns.
- 1. In the Community Builder Page Editor, select Record Detail or your custom record detail page from the page menu.
- 2. Select the Record Information Tabs component or drag the component from the Page Editor to the page to add it.
- **3.** In the property editor, configure properties for the component:

Property	Details
Record ID	The ID of the record. This value is automatically populated.
Details Tab Label	Label for the tab that shows record details. The default label is Details.
Related Tab Label	Label for the tab that shows lists of related records. The default label is Related.
Discussion Tab Label	Label for the tab that shows the record feed. The default label is Discussions. This label is used on mobile devices only.

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



#### SEE ALSO:

Which Components Can I Use with Each Template?

### **Record List**

The Record List component shows a list of records on the Record List page. Users can view records, switch between record list views, and create records directly from the list view. If a user doesn't have access to a particular list view, they see the Recently Used list view instead.



Note: Before Spring '16, this component was named Record List View.

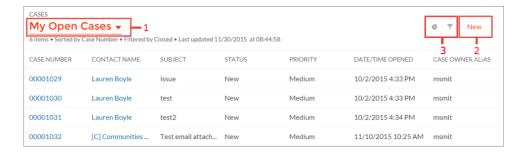
When you create a custom navigation menu item using the Salesforce Object type, it automatically links to a page that displays a list of the records for the selected object. The Customer Service (Napili) template provides an out-of-the-box page to display such a list of records. This generic page is called the Record List page. It's used for all objects in your community that don't have a custom page assigned to them.

- The Record List component supports accounts, cases, contacts, campaigns, campaign members, groups, leads, opportunities, and custom objects.
- You can use the Record List component on any page in your community. We recommend adding it to custom list views that you create. You can also create a navigation menu item to link to that page with its internal page URL.
- The Record List component is available in two layouts—Full and Compact—so you can choose the one that best meets your needs.
   The compact layout is ideal for showing short lists of information in a narrow column or when displaying your community on a mobile device. When a page using the full layout is viewed on a mobile device, the page automatically switches to the compact layout.
- Community members with the necessary permissions can use the New button on the component to create records. This button doesn't display on mobile devices.
- Community members can click to filter the list view or remove filters. They can also click to view related charts. These buttons don't display on mobile devices.
- 1. Select the **Record List** component on the Record List page.
- 2. In the property editor, configure properties for the component:

Details
The number of entries retrieved to show in the list view. The default is 25.
When the compact layout is selected, this is the number of records shown. If there are more than 25 records, you click a link to see the full list of records. The maximum number of records for the compact layout is 100.
When the full layout is selected, this is the number of records initially shown. As a user scrolls down, more records are displayed. The maximum number of records per page for the full layout is 100.
Choose from full layout or compact layout. When choosing the layout, consider the following:
• Compact layout works in any size column. For full layout, use a column width of at least 50% of the page.
<ul> <li>If using the full layout, we recommend that you don't place a component below the Record List component on the page.</li> </ul>
<ul> <li>Full layout has a minimum height of 700 pixels. If you place a component below the full layout of the Record List component, the Record List component can overlap with the component below.</li> </ul>

Which Components Can I Use with Each Template?





#### Community members can:

- Use the menu (1) to change the list view.
- Use the New button (2) to create a record. A window pops up where a user can enter and save record details.
- Use the buttons (3) to filter the list view or view related charts. Because external community users can't be assigned the "Create and Customize List Views" permission, they can't filter list views.

Sample Record List component (Compact layout):



SEE ALSO:

Which Components Can I Use with Each Template?

### **Record Related List**

The Record Related List component shows a list of records that are related to a record. For example, if you're looking at an account, you can see a related list of contacts for that account. Use the Record Related List component on a record detail page or on a custom page to show a list of related records. Members can create records from the list and from lookups.

When a user expands the list of related records, the Related Record List page is displayed, which uses the Record Related List component under the hood.

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

Property	Details
Parent Record ID	The ID of the parent record.
Related List Name	Name of the related list.



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



SEE ALSO:

Which Components Can I Use with Each Template?

#### **Related Articles List**

The Related Articles List component displays the articles related to the article the user is viewing.

In the Page Editor, you can configure the Related Articles List component on the Article Detail page.

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

Property	Details
Number of Articles	Enter the maximum number of articles to display in the list. You can display up to 10 articles. The default value is 5.
Title	Enter a title for the list of related articles. The default text is Related Articles.
Show Views	Select to show the number of times an article is viewed $_{\odot 2}$ . Clear to hide the view count.



Example: Sample Related Articles List component:



#### SEE ALSO:

Which Components Can I Use with Each Template?

### **Related Questions List**

The Related Questions List component displays the questions related to the question the user is viewing.

In the Page Editor, you can configure the Related Questions List component on the Question Detail page. To use this component, your community must have a best answer for at least one question.

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

Property	Details
Number of Questions	Enter the maximum number of questions to display in the list. You can display up to 10 questions. The default value is 5.
Title	Enter a title for the list of related questions. The default text is Related Questions.
Show Views	Select to show the number of times a question is viewed, liked, or commented on, $_{\odot}$ 2. Clear to hide the view count.



**Example:** Sample Related Questions List component:



#### SEE ALSO:

Which Components Can I Use with Each Template?

## **Related Topics List**

The Related Topics List component displays the topics related to the topic being viewed by the user.



Note: Before Spring '16, this component was named Related Topics.

In the Page Editor, you can configure the Related Topics List component on the Topics View page.

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

Property	Details
Title	Enter a title for the list of related topics. The default text is Related Topics List.
Topic ID	This field populates dynamically with the topic ID.
Show the number of people using the Topic	Shows the number of people who are using the topic.



**Example:** Sample Related Topics List component:



#### SEE ALSO:

Which Components Can I Use with Each Template?

# **Report Chart**

Use the Report Chart component to drag and drop reports you set up in your Salesforce org's public folder to your community's pages.

When you click a report, you see the Report Detail page, which shows the Report Summary component. The report summary includes details from the source report in Salesforce.



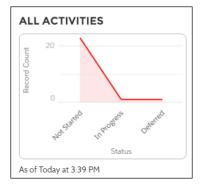
Note: Only reports with a chart populate in the drop-down list in the report's properties.

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

Property	Details
Report Name	Reports with charts, available for use in the community.
Filter By	Setting a filter on the report chart data is supported only for record pages. If you set a filter option, the Report Chart component displays only that filtered data to users.
Refresh Time (Minutes)	The number of minutes between each report refresh.
Show report name	Adds the report name to the community page.
Show refresh button	Shows a refresh button, so users can refresh the chart.



**Example**: Report Chart component:



## **Report List**

The Report List component lets users view reports in list form.

The report list can be filtered with these criteria:

- Recent
- Created by Me
- Private Reports
- All Reports

In addition, users have access to report folders. Folders include:

Created by Me

- Shared with Me
- All Folders

The Report List component doesn't have any editable properties.

Note: The Report List component can only be used on the Report List page.

Example: Sample Report List component:

[insert image]

# **Report Summary**

The Report Summary component lets users see a snapshot of the report details from the source report.

Use the Report Summary component on the Report Detail page to see a report's details. Using the component, members can see a report chart, filter data, see the feed, refresh the report, or change its settings. Members with sufficient permissions can also clone, save, export, or subscribe to the report.

- 1. Select the **Report Summary** component in the Report Detail page.
- 2. In the property editor, configure properties for the component:

Property	Details
Report Id	This field autopopulates with the record ID of the report.

# Reputation Leaderboard

The Reputation Leaderboard component displays a list of community members with the highest reputation points.

In the Page Editor, you can configure the Reputation Leaderboard component on the Home page.

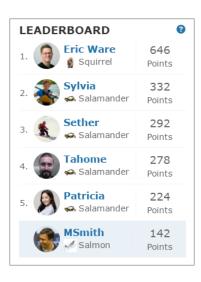
- 1. Select the Reputation Leaderboard component.
- **2.** In the property editor, configure properties for the component:

Property	Details
Title	Enter a title for the reputation leaderboard. The default text is Leaderboard.
Number of Users	Enter the maximum number of users to display. You can display up to 10. The default is 5.
Show user rank	Displays the ranks of the users shown in the leaderboard.
Show logged-in user	• If the logged-in user doesn't rank on the leaderboard, a row for the user appears at the bottom of the leaderboard.
	<ul> <li>If the logged-in user ranks on the leaderboard, AND the Show User Rank checkbox is selected, AND Knowledge and Points or Knowledge and Last Active is displayed, the user sees a message about their ranking. For example, "Congratulations! You rank #2."</li> </ul>

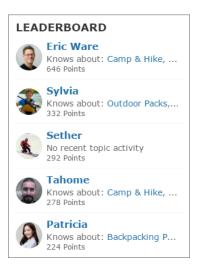
Property	Details
Show help bubble	Displays a question mark icon at the top of the leaderboard that a user can hover over to get more info.
Exclude internal users	Excludes internal users from the leaderboard.
Help Bubble Text	Enter the message that appears when a user hovers over the question mark icon. The message can be up to 500 characters. The default text is Earn points and climb to new levels when you contribute in the community!
Display Users':	Determines what information about a user shows in the leaderboard. Options include:
	• Levels and Points—Shows a user's reputation level and total number of reputation points.
	• Knowledge and Points—Shows a user's total number of reputation points and topics that they're knowledgeable about.
	• Knowledge and Last Active—Shows topics a user is knowledgeable about and when the user was last active.
Topic Knowledge Label (Up to 20 chars.)	When Knowledge is shown in the leaderboard, this text appears before the topics a user is knowledgeable about. The default text is Knows about. For example, if a user is knowledgeable about backpacks, their leaderboard entry would say "Knows about: Backpacks."

**Example:** Sample Reputation Leaderboard component:

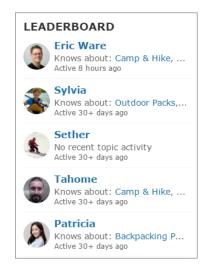
### **Level and Points**



### **Topics and Points**



### **Topics and Last Active**



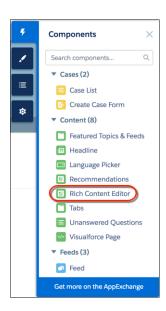
SEE ALSO:

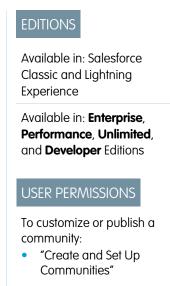
Which Components Can I Use with Each Template?

### **Rich Content Editor**

The Rich Content Editor component lets you add formatted custom text to your community pages, along with images and videos.

**1.** In Community Builder, drag the Rich Content Editor component from the Components panel onto the page canvas.





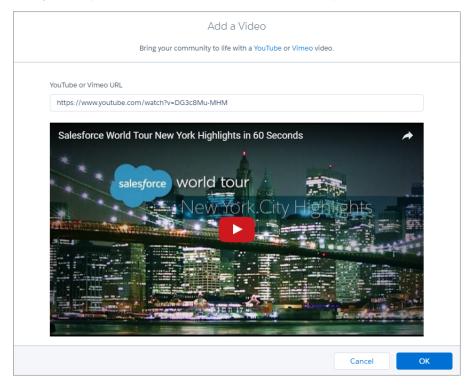
2. Add and format text (1), and add images (2), a YouTube or Vimeo video (3), source code markup (4), and links (5) directly in the editor.



Note: Images and videos are supported only in Rich Content Editor components that were added after the Spring '16 release.

**(1)** 

**Example**: Sample YouTube video in the Rich Content Editor component:



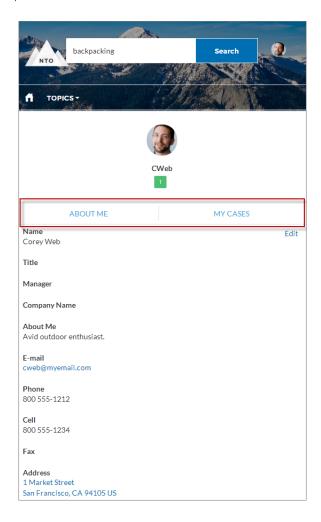
# Scroll To

Custom code on the Profile page in the Customer Service (Napili) template lets users scroll to the selected component from a user's profile page. This saves a mobile user from having to scroll to a profile component that isn't visible on his or her device.

- 1. On the Profile page, right-click the area of custom code below the User Profile Header, and click Edit.
- 2. In the Edit Code page, you can change the labels that let mobile users navigate in their profile.



**Example:** Sample Scroll To component:



#### SEE ALSO:

Which Components Can I Use with Each Template?

### Search

The Search component lets users search articles within the context of the page they're viewing.

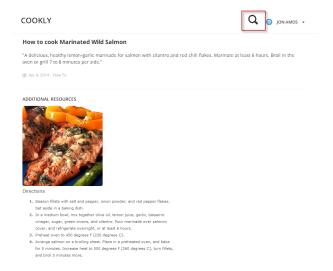
When a user types in the search text box, the system returns suggested articles and search strings that match the characters typed in the search box.

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

Property	Details
Placeholder Text	Enter the text that appears in the search bar. The default value is What would you like to know?

Property	Details
Category Name	The top-level category that contains the subcategories for articles is automatically set using an expression that uses the top-level category you specified in the template's Custom Properties.
Max Number of Auto Query Suggestions	Select the number of search queries to return per match.
Max Number of Article Title Match Results	Select the number of articles to return per match.

**Example:** Sample Search component:



SEE ALSO:

Which Components Can I Use with Each Template?

#### Search & Post Publisher

The Search & Post Publisher component lets your users search for articles, discussions, and any object available to your community members and made searchable. It also lets users ask questions or contact support when they can't find the information they're looking for.

Autocomplete search results are based on whether the discussion, article title, or record contains the text entered by the user. The search accounts for partially matching terms and non-adjacent terms. For example, the results for "best backpack" could include a question titled "Which backpack is best for day hikes?" The results for "backpack" could include an article titled "Backpacking Tips." When a user performs a full search by clicking **Search**, the search engine also scans question descriptions and article text for matching terms.

Customize the Search & Post Publisher to meet the needs of your community. Turn on autocomplete search to suggest search results to users, add a footer so that users can contact support if they can't find what they're looking for, and customize the post publisher for when users post questions to the community.

1. Select the **Search & Post Publisher** component in the page you're configuring.

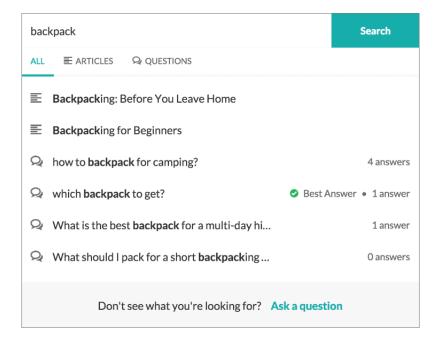
**2.** In the property editor, configure properties for the component:

Property	Details
Autocomplete Search	Click to expand the section with autocomplete search properties.
Placeholder Text for Search Field	Specify the text that appears in the search box. The default text is Search
Use autocomplete in searches	Select this option to let users see suggested search results as they enter search terms.
Show autocomplete results in one list	Select this option to display suggested search results in one list as a community member enters search terms. Otherwise, the suggested results are shown in tabs.
	Note: This option must be enabled if you want autocomplete search results that can be sorted by relevance.
Maximum Autocomplete Results	Enter the maximum number of suggested results displayed on each tab during a search. The default is 6. An equal number of questions, articles, and objects is displayed in the combined results tab, but if there aren't enough of one type of result, additional results of the other type are displayed to reach the maximum. This functionality is available only in the Winter '16 and later versions of community templates.
Show Discussions results before Articles	By default, articles appear above questions in the combined search results, and the article results tab precedes the question results tab. Select this option to display questions before articles and to switch the tab order. This functionality is available only in the Winter '16 and later versions of community templates.
Autocomplete Results: Sort by Relevance	Click to expand the section that allows you to add searchable Salesforce objects to autocomplete results and have results sort by relevance.
Objects in Autocomplete Results	Click <b>Add</b> to add searchable Salesforce objects to your community's autocomplete results.
Autocomplete Results: Group by Object	Click to expand the section with that allows you to set grouping by object for autocomplete results.
All Results Label	Enter the name of the search results tab that displays results from all the searchable articles, discussions, and objects in the community. The default text is All. This functionality is available only in the Winter '16 and later versions of community templates.
Article Results Label	Enter the name of the search results tab that displays articles only. The default text is Articles. This functionality is available only in the Winter '16 and later versions of community templates.
Discussion Results Label	Enter the name of the search results tab that displays discussions only. The default text is Questions. This functionality is available only in the Winter '16 and later versions of community templates.
Ask Community	Click to expand the section with properties regarding asking the community.
Show footer during search	Select this option to display the footer giving members an option to ask the community a question.

Property	Details
Post to Ask the Community	Enter the text that invites users to post a question to the community or to customer support. The default text is: Don't see what you're looking for?.
Create Your Question Prompt	Enter the text that users click to ask a question. The default text is: Ask a question.
Create Your Sign-In Prompt	Enter the text that directs users to a login page before they ask a question. The default text is: Sign in to ask a question.
Post to Publisher	Click to expand the section with posting properties.
Discussion Publisher Title	Enter the title of the modal window that members use to post questions.
Select Navigational Topic Destination	Enter the text that lets users pick a navigational topic for their question. The default text is: Post to a navigational topic.
Post To Topic	Enter the text that appears before the navigational topic name that the user chooses. For example, if a user posts a question to Coffee, the onscreen text says Post to Coffee.
Topic Required Label	Enter the text that shows that selecting a topic is required.
Allow file attachments	Select this option to let users attach a file to a question.
Contact Support	Click to expand the section with properties regarding contacting support.
Let members contact support	Select this option to let users contact customer support to create a case.
Create Support Case Label	Enter the text to display for the option to create a case. The default text is Contact Support.
Create Private Support Case Label	Enter the text to display for the option to contact support in a private message. The default text is Private.
Case Action Name	Enter the name of the action that creates new cases. Use the action layout editor to specify which fields to include in the layout. You also need to include this action in the Web-to-Case settings. For more information on quick actions and Web-to-Case, see the Salesforce Help.



**Example**: Sample Search Publisher component:



SEE ALSO:

Which Components Can I Use with Each Template?

### Search Results

The Search Results component lets users view tabbed lists of articles and discussions that are returned from selecting a topic or typing a string in the Search Publisher.



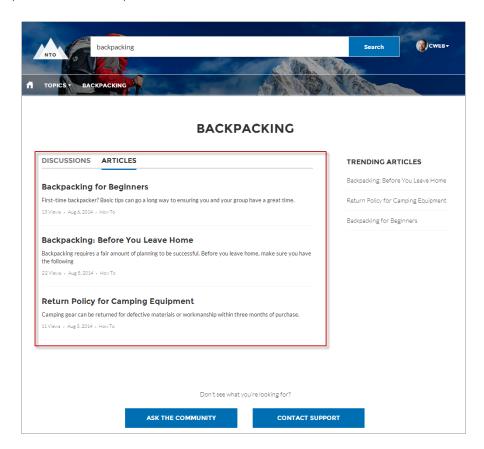
Note: Before Spring '16, this component was named Results List.

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

Property	Details
Articles Tab Label	Enter the text that appears on the tab that users select to view the list of returned articles. The default text is Articles.
Discussions Tab Label	Enter the text that appears on the tab that users can select to view the list of returned discussions. The default text is Discussions.
Topic ID	The expression in the Topic ID field uses the topic ID that the user selects when filtering by topic.
Search Term	The expression returns results based on the text users enter when typing their search queries.
Active Tab	Specify which tab you want to appear as selected with its contents exposed, when the page loads. The expression retrieves the parameter from the query string in the URL for the page.

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

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



SEE ALSO:

Which Components Can I Use with Each Template?

### Set Case Status Button

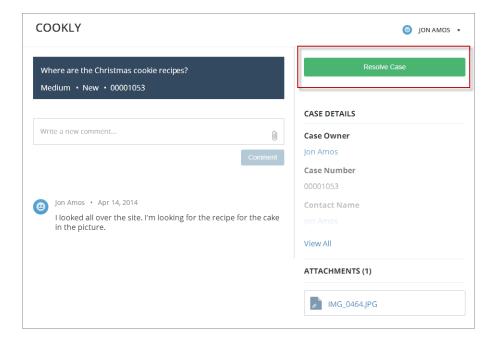
The Set Case Status Button component lets users click a button to mark a case as resolved and close it.

Note: Before Spring '16, this component was named Case Status Button.

- 1. Select the **Set Case Status Button** component in the page you're configuring.
- **2.** Configure properties for the component in the property editor:

Property	Details
Case ID	Leave the default query string for the unless you plan to customize the component and add your own query string. The system uses the query string in this field to return the Case ID.
Active Status Label	Enter the text that appears on the button when the case is still open. For example, the button can be labeled <b>Close Case</b> or <b>Resolve Case</b> .
Inactive Status Label	Enter the text that appears on the button when the case is closed. For example, the button can be labeled <b>Re-Open Case</b> .

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



#### SEE ALSO:

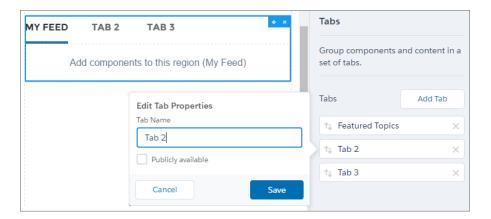
Which Components Can I Use with Each Template?

### Tabs

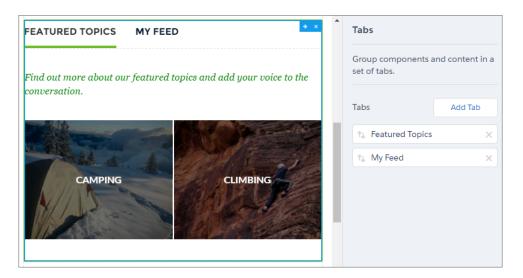
Use the Tabs component in the Customer Service (Napili) to group other components in a set of customizable tabs for structure. Add as many tabs as you need and whatever components you want. You can rename and reorder the tabs, and choose whether to show or hide individual tabs to guest users in the community.

- 1. Add the **Tabs** component to a page or select it on the page you're configuring.
- 2. In the property editor, configure the component.
  - To add another tab, click Add Tab.

- To rename a tab or set its public availability, select the tab. To make that tab available to guest users in the community, select **Publicly available**. If no tabs are publicly available, the entire Tabs component is hidden from guest users.
- To reorder a tab, drag the tile to the correct position.



- **3.** Add the components you need to each tab.
  - Note: You can't add a Tabs component to another Tabs component.
- **Example:** Sample Tabs component with two renamed tabs—Featured Topics and My Feed:



SEE ALSO:

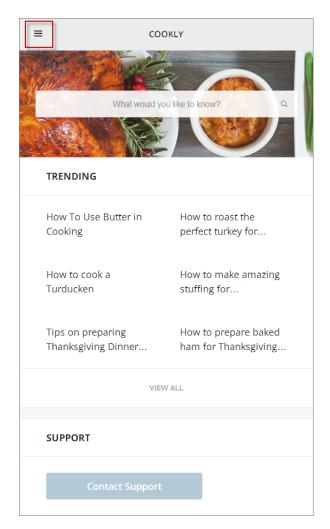
Which Components Can I Use with Each Template?

# **Toggle Button**

The Toggle Button component lets users display or collapse the left navigation menu for mobile devices and tablets. It doesn't appear in the desktop view.

You can find the **Toggle Button** component in the template header.

- Select the Toggle Button component in the page you're configuring.
   There are no properties to set for this component.
- **Example:** Sample Toggle Button component:



SEE ALSO:

Which Components Can I Use with Each Template?

# **Topic Catalog**

The Topic Catalog component lets community members see a full listing of navigational parent and subtopics you have set up for the community in one convenient location.

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

Level	Maximum Number of Entries
One (parent)	25
Two (subtopic)	10
Three (subtopic)	10

- Note: The topic catalog shows only navigational topics and subtopics, and is only visible after you set them up.
- 1. Edit the Navigation Menu component in your community (typically, on the home page).
- 2. Select Add the "More Topics..." link.
- **Example**: When community members can click More Topics link from the Topics list in the navigation menu, they see the topic catalog.



#### **TOPICS**

BACKPACKING		
Climbing Backpack	Excursion Backpack	Computer Cases
Hiking Backpack	Events Discussion	Rolling Backpack Cases
School	Waterfest	
Computer	VAGKRAFT	

SEE ALSO:

Which Components Can I Use with Each Template?

# **Topic Description**

The Topic Description component is used on the Topic Detail page in the Customer Service (Napili) community template. It shows the topic's description as entered in Community Management.

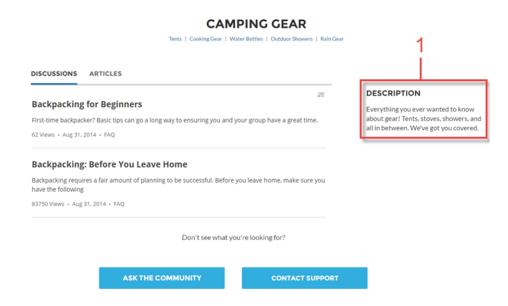
- 1. Select the **Topic Description** component in the page you're configuring.
- **2.** In the property editor, configure properties for the component:

Property	Details
Topic ID	The system supplies this value, and populates the component with the description tied to the topic shown on the topic detail page.

Property	Details
Title	Enter text for the title. The default text is Description.

**Example:** Sample Topic Description component.





SEE ALSO:

Which Components Can I Use with Each Template?

# **Topic Metrics**

The Topic Metrics component lets users see how often community members use a topic.

You can show the number of posts, articles, and followers that a topic has, and how many people have used the topic in the last 60 days. Use the Topic Metrics component on the Topic Detail page.

- 1. Select the **Topic Metrics** component on the page you're configuring.
- **2.** In the property editor, configure properties for the component:

Property	Details
Show Posts	Enable this setting to show the number of posts tagged with the topic.
Show Articles	Enable this setting to show the number of articles tagged with the topic.

Property	Details
Show Followers	Enable this setting to show the number of people following the topic.
Show how many people used the topic in the last 60 days.	Enable this setting to show how many community members have used the topic in the past 60 days.
Topic ID	This field populates dynamically with the topic ID.

# **Trending Articles**

The Trending Articles component displays the most popular articles in your community. You can display them sorted by category or just display the top articles regardless of category.

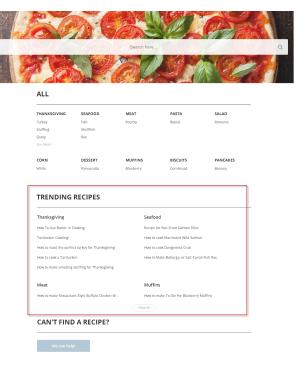
An article's popularity is based on the number of recent views. You can specify two different display options for this component:

- A two-column list of the top trending articles for the community.
- Two or more columns of trending articles sorted by data category. When a data category doesn't have any articles that are trending, it doesn't appear in the list.
- 1. Select the **Trending Articles** component in the page you're configuring.
- **2.** In the property editor, configure properties for the component:

Details
The top-level category that contains the subcategories for articles is automatically set using an expression that uses the top-level category you specified in the template's Custom Properties.
Enter the maximum number of articles to display in the component. If you are using the two-column view with images, this will be the total number of articles that appear in the component. If you choose to display articles by data category, this will be the number of articles per child category.
Enter the maximum number of categories to display in the component. This value controls whether the trending articles are organized by category or not:
• To view a list of trending articles that isn't organized by categories, type $\it o$ in the field.
<ul> <li>To view trending articles organized by data category, specify the number of categories to display.</li> </ul>
Note: If you specify a parent category that has no children, the component will display the trending articles without categories even if you specify a number in this field.
Enter a title for the component. The default text is <i>Trending</i> .



**Example:** Sample Trending Articles component:



SEE ALSO:

Which Components Can I Use with Each Template?

# Trending Articles by Topic

The Trending Articles by Topic component displays the most popular articles in your community organized by topic.



Note: Before Spring '16, this component was named Topic Trending Articles.

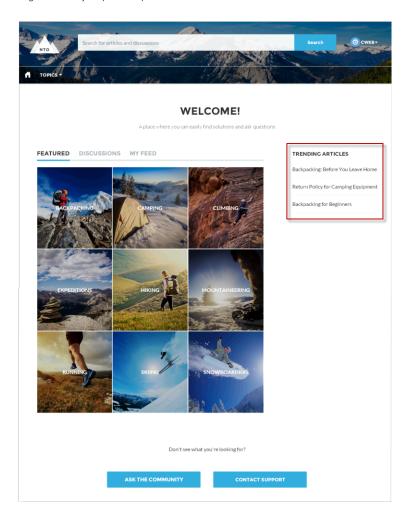
The topicID attribute is optional. If it's not set, then trending articles scoped by all managed topics appear in the component. An article's popularity is based on the number of recent views.

- 1. Select the **Trending Articles by Topic** component in the page you're configuring.
- **2.** In the property editor, configure properties for the component:

Property	Details
Title	$\label{thm:component} Enter the \ \text{text that is the title for the component.} The \ \text{default text is} \ \textit{Trending} \ \textit{Articles}.$
Number of Articles	Enter the maximum number of trending articles to display.
Topic ID	The expression in the field uses the ID from the topic that the user selects to display the list of articles. To display articles from all managed topics, leave this field blank.

**(1)** 

**Example:** Sample Trending Articles by Topic component:



SEE ALSO:

Which Components Can I Use with Each Template?

# **Trending Topics**

The Trending Topics component displays the popular topics in your community.

In the Page Editor, you can configure the Trending Topics component on the Home page.

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

Property	Details
Title	Enter a title for the list of trending topics. The default text is Trending Topics.
Number of Topics	Enter the number of trending topics to display. You can display a maximum of five topics at a time.



**Example:** Sample Trending Topics component:



#### SEE ALSO:

Which Components Can I Use with Each Template?

#### **Unanswered Questions**

The Unanswered Questions component lets users see the most viewed unanswered questions in a community. The component shows the top unanswered questions based on the view count across the community. As questions are answered, they are removed from view.



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

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

Property	Details
Title	The title of the component. The default text is Do you have the answer?.
Number of Questions	Enter the number of questions to show on the list. The default is 5.
Show views	Show the number of times the question has been viewed by users.

### User Profile

The User Profile component shows detailed information for a user, including contact information, profile photo, Chatter statistics, topics the user is knowledgeable about, who the user is following, and the user's followers.

The User Profile component uses a two-column layout by default. Profile details and the profile image are always shown, but you choose if you want to show related lists, Chatter statistics, and Knowledgeable About. You can also customize labels.

The layout of the component also makes it ideal for viewing your community on a mobile device. When viewed on a mobile device or tablet, the component uses a single column layout that includes four tabs: Feed, Cases, Details, and Related. The Cases tab is only visible when a user views their own profile. You can edit all tab labels.

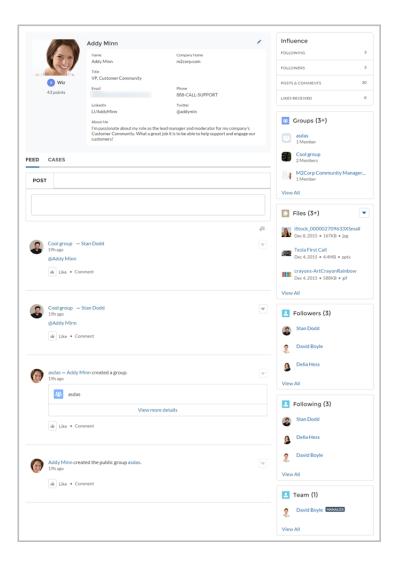
If nickname display is enabled for the community, the nickname is shown in place of the full name when a user views another user's profile. The full name is shown when a user views their own profile.

If you prefer to use a different layout or want more granular control over the placement of user profile content, create a custom community page and use the User Profile Summary, User Profile Tabs, User Profile Statistics, User Profile Knowledgeable About, and User Profile Related List components.

- 1. Select the **User Profile** component in the page you're configuring.
- **2.** Select the Properties pane to view properties for the component:

Show Record Activity  Show Influence  Influence Label  Show Knowledgeable  About  Knowledgeable About Label  Maximum Topics in Knowledgeable About	The system supplies this value so that authenticated users can view their own information. Don't update this field.  Shows posts and comments on records in your feed. For example, if a user comments on a record in the community, and you have access to the record, you see the update in your feed. If disabled, the feed shows only activity, such as questions and answers, from within the community. This option is disabled by default.
Show Influence Control of Control	record in the community, and you have access to the record, you see the update in your feed. f disabled, the feed shows only activity, such as questions and answers, from within the
Influence Label  Show Knowledgeable About  Knowledgeable About Label  Maximum Topics in Knowledgeable About	community. This option is disabled by default.
Show Knowledgeable About  Knowledgeable About E Label  Maximum Topics in Knowledgeable About U	Determines if the user's Chatter statistics are shown. Statistics include number of posts and comments, likes received, followers, and people they're following.
About  Knowledgeable About E Label  Maximum Topics in E Knowledgeable About U	Enter a title for the Influence list. The default text is Influence.
Label  Maximum Topics in E Knowledgeable About U	Determines if the Knowledgeable About list is shown.
Knowledgeable About u	Enter a title for the Knowledgeable About list. The default text is Knowledgeable About.
Displayed (up to 10)	Enter the maximum number of topics listed for each user in the Knowledgeable About list, up to a limit of 10.
	Determines if related lists are shown. Related lists can include Followers, Following, Groups, and Files.
	Enter the text you want to display on the tab that users select to view a user's Chatter feed. The default text is <i>Feed</i> .
	Enter the text you want to display on the tab that users select to view their cases. This only displays for users on their own profile. The default text is <code>Cases</code> .
	Enter the text for the label that appears at the top of the list of cases. The default for this field S My Cases.
Case Filter Name or ID E	Enter the name of the list view that displays cases.
	Enter the text you'd like to display on the button that users can click to create a case. The default text is Create Case.
Label (Mobile only) K	Determines if a tab appears for the record details. Record details include profile details, Knowledgeable About, and Influence. The tab label is <code>Details</code> . Available only when a community is viewed on a mobile device.
Related Records Tab  Label (Mobile only)  T	Continuating to viewed off a friodile device.

**Example**: Sample User Profile component



SEE ALSO:

Which Components Can I Use with Each Template?

### **User Profile Detail**

The User Profile Detail component shows details about a user including contact information, profile photo, Chatter statistics, and topics the user is knowledgeable about. On other users' profiles, it also shows a Follow button.



Note: Before Spring '16, this component was named User Profile Body.

Chatter statistics for the community include number of posts and comments, likes received, followers, and people the user is following. Knowledgeable About shows top topics that people know about, so the community can quickly see areas of expertise. Topic knowledge is calculated based on factors such as best answers, mentions, or likes on questions and posts.

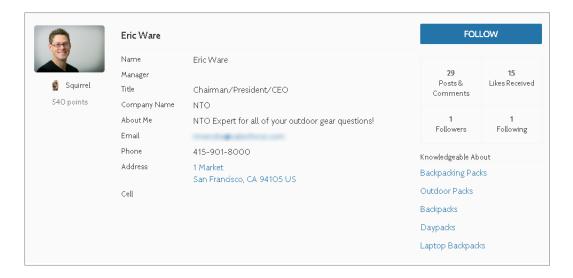
If nickname display is enabled for the community, the nickname is shown in place of the full name when a user views another user's profile. The full name is shown when a user views their own profile.

1. Select the User Profile Detail component in the page you're configuring.

**2.** To view properties for the component, select the Properties pane:

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

**Example:** Sample User Profile Detail component:



By default, all the information in a user's profile is visible to all users in the community, including to unlicensed guest users accessing the community. To limit access to members' information, use a custom user profile page layout and hide fields that reveal sensitive information, such as phone, email, title, and manager.



**Note**: Showing many user fields in a custom layout affects the performance of the profile view. We recommend showing no more than 8 fields.

Similarly, consider modifying the fields for unlicensed guest user profiles to show only the necessary information. For example, you could hide the manager field. For detailed instructions on customizing page layouts, see the Salesforce online help.

# User Profile Image

The User Profile Image component displays the user's reputation level, reputation points, and profile photo.



Note: Before Spring '16, this component was named User Profile Header.

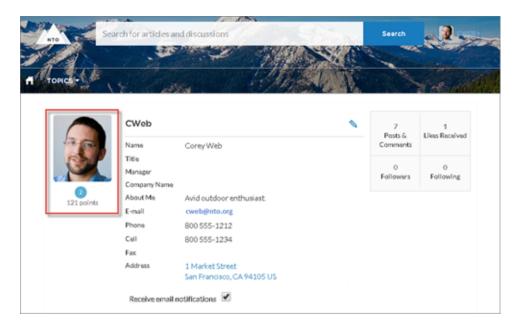
You can find the user profile image component in the Profile page. This component allows users to upload their profile photos in the community.

- Ø
  - Note: The user's reputation level and points display only if reputation is enabled in the community.
- 1. Select the **User Profile Image** component in the page you're configuring.
- 2. In the property editor, configure properties for the component:

Property	Details
User ID	The system supplies this value so that authenticated users can view their own information. Don't update this field.

**(3)** 

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



SEE ALSO:

Which Components Can I Use with Each Template?

### **User Profile Knows About**

Allow community members to endorse and recognize experts using the widget directly on a member's profile page.

Once you have enabled Knowledgeable People, community members can endorse one another directly on their community's user profile page. The user profile page also displays all the topics the community member is knowledgeable about, and the number of endorsements received for each topic. Community members aren't able to endorse themselves on any topics.

Community members endorse one-another on existing topics, and they can use the widget to enter new topics for endorsements. The widget shows the number of endorsements members have for each topic they know about. Clicking the thumbs up buttons adds or removes endorsements, based on whether the member has been endorsed or not.



**Note**: Before Summer `16, this component was named Knowledgeable About. The component name for communities built before Summer `16 remains Knowledgeable About.

- 1. Do one of the following:
  - To display the Knows About list within the User Profile component, select that component.
  - To display the list elsewhere on the profile page, drag the User Profile Knows About component to the desired location.
- **2.** In the property editor, configure properties for the component:

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





SEE ALSO:

Which Components Can I Use with Each Template?

### User Profile Related List

The User Profile Related List component shows lists of a user's files, groups, followers, and who they're following.

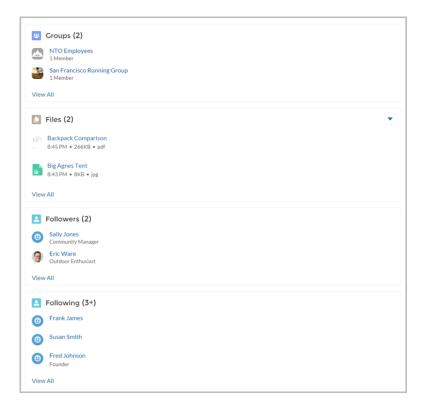
Add the User Profile Related List component to the User Profile page to show a user's related lists. Users can view full details for a related list by clicking **View All** at the bottom of the list. On the Files related list, users can click to upload a file.

You can customize which related lists are visible in your community by editing the User Profile page layout.

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

Property	Details
User ID	The system supplies this value. Don't update this field.

**Example:** Sample User Profile Related List component



#### SEE ALSO:

Which Components Can I Use with Each Template?

### **User Profile Stats**

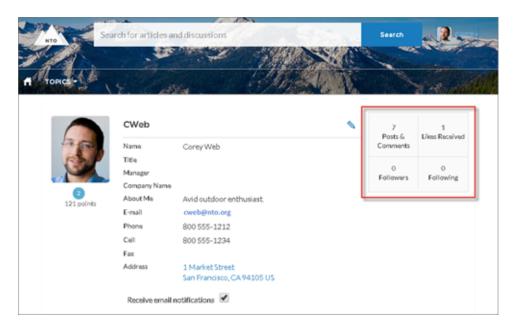
The User Profile Stats component displays the user's Chatter statistics for the community, including number of posts and comments, likes received, followers, and people they're following.

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

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

Property	Details
User ID	The system supplies this value. Don't update this field.

**Example:** Sample User Profile Stats component:



#### SEE ALSO:

Which Components Can I Use with Each Template?

# **User Profile Summary**

The User Profile Summary component displays the user's contact information, title, manager's name, and address. If nickname display is enabled for the community, the nickname is shown in place of the full name when a user views another user's profile. The full name is shown when a user views their own profile.

Note: Before Spring '16, this component was named User Profile Detail.

By default, all the information in a user's profile is visible to all users in the community, including to unlicensed guest users accessing the community. To limit access to members' information, use a custom user profile page layout and hide fields that reveal sensitive information, such as phone, email, title, and manager.

Note: Showing many user fields in a custom layout affects the performance of the profile view. We recommend showing no more than 8 fields.

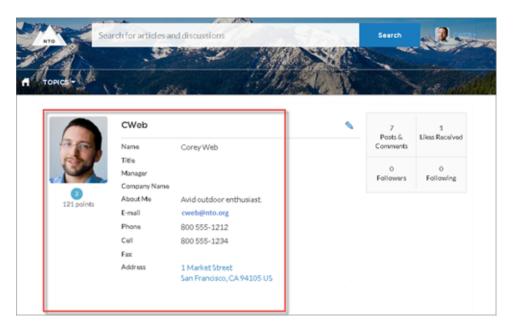
Similarly, consider modifying the fields for unlicensed guest user profiles to show only the necessary information. For example, you could hide the manager field. For detailed instructions on customizing page layouts, see the Salesforce online help.

You can add the User Profile Summary component to the Profile page. This component allows users to edit their profile information from the community. When viewing another user's profile, you can click their address to see a Google map of their location.

- Note: When viewing a community on a mobile device, the Google map appears below the address.
- 1. Select the **User Profile Summary** component in the page you're configuring.
- **2.** To view properties for the component, select the Properties pane:

Property	Details
User ID	The system supplies this value so that authenticated users can view their own information. Don't update this field.

Example: Sample User Profile Summary component:



SEE ALSO:

Which Components Can I Use with Each Template?

# User Profile Summary & Image

The User Profile Summary & Image component displays a user's photo, contact information, reputation level, title, and manager's name. If nickname display is enabled for the community, the nickname is shown in place of the full name when a user views another user's profile. The full name is shown when a user views their own profile.

Note: Before Spring '16, this component was named User Profile Header Detail.

By default, all the information in a user's profile is visible to all users in the community, including to unlicensed guest users accessing the community. To limit access to members' information, use a custom user profile page layout and hide fields that reveal sensitive information, such as phone, email, title, and manager.

Similarly, consider modifying the fields for unlicensed guest user profiles to show only the necessary information. For example, you could hide the manager field. For detailed instructions on customizing page layouts, see the Salesforce online help.

Users in Koa and Kokua communities access the user profile detail by viewing their own profile or clicking another member's name. In their own profile, users can click the pencil icon to edit their contact information. In another user's profile, users can click **Follow** to see the user's community activity directly in their feed. Clicking another user's address displays a Google map of their location.



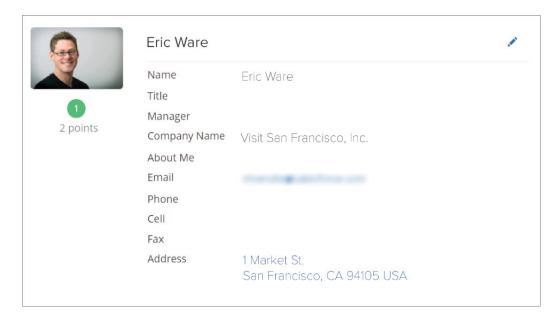
(1) Important: To avoid issues, make sure that the User Profile Summary & Image component and the Case List component occupy different regions of the My Cases page. They occupy different regions by default, but it is a good practice to verify in your community.

To check, navigate to the My Cases page in Community Builder, go to the Page Editor, and click listed under one region—for example, Content—drag one to a different region.

- 1. Select the **User Profile Summary & Image** component in the page you're configuring.
- **2.** To view properties for the component, select the Properties pane.

Property	Details
User ID	The system supplies this value so that authenticated users can view their own information. Don't update this field.

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



#### **User Profile Tabs**

The User Profile Tabs component lets users see their feed and cases on their profile. They can also post to their feed directly from their profile. When viewing another user's profile, they see the user's activity but not their cases.

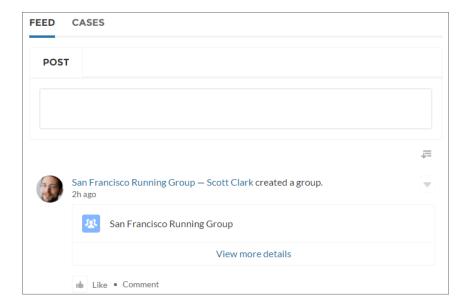
On desktops and tablets, users see a list view of up to 25 of their most recent cases. They can sort columns in the list and click the case number to view the details of that case. Navigation arrows let them click through the list of cases when there are multiple pages. On mobile devices, the view is optimized and users scroll through a list of cases and select a case to see its details.

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

Property	Details
User ID	The system supplies this value. Don't update this field.
Feed Tab Label	Enter the text you want to display on the tab that users select to view a user's Chatter feed. The default text is <i>Feed</i> .
Cases Tab Label	Enter the text you want to display on the tab that users select to view their cases. This only displays for users on their own profile. The default text is <code>Cases</code> .
Case Filter Name or ID	Enter the name of the list view that displays cases.
	Note: By default, the template uses the AllOpenCases view, which lets users view any open cases that they have permission to see. Configure sharing to ensure that users see only cases that belong to them. Alternatively, you can use another pre-defined list view or create a custom list view.
Header Title	Enter the text for the label that appears at the top of the list of cases. The default for this field is My Cases.
Create Case Label	Enter the text you'd like to display on the button that users can click to create a case. The default text is Create Case.
Show Record Activity	Shows posts and comments on records in your feed. For example, if a user comments on a record in the community, and you have access to the record, you see the update in your feed. If disabled, the feed shows only activity, such as questions and answers, from within the community. This option is disabled by default.



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



Case list viewed on a mobile device:



SEE ALSO:

Which Components Can I Use with Each Template?

# **User Settings**

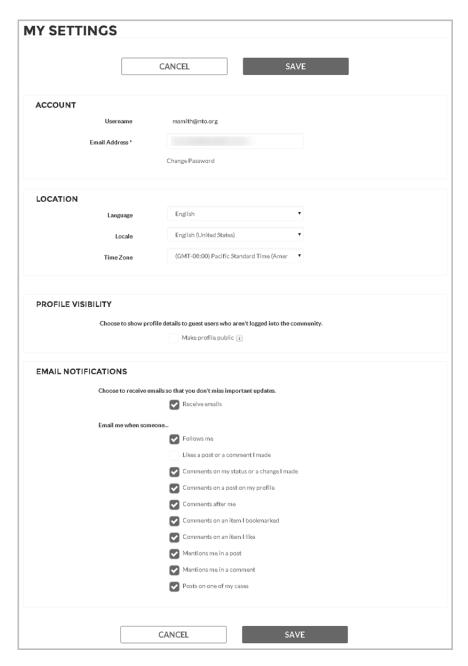
The User Settings component displays a user's username, email address, language, locale, time zone, profile visibility, and email notification settings. User settings are only available for authenticated users.

On the User Settings component, users can change their language, locale, and time zone so that the community is localized appropriately. A user can also see their username and change their email or password. Users can choose to show their profile details to guest users who aren't logged in to the community. Users can also choose to receive email based on events in the community. If a user doesn't want to receive email about events in the community, he or she can disable email notifications.

- 1. Select the **User Settings** component in the page you're configuring.
- 2. In the property editor, configure properties for the component:

Property	C	Details
User ID	Т	he system supplies this value. Don't update this field.

**Example:** Sample User Settings component:



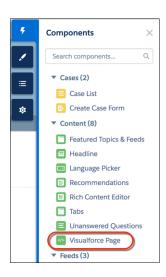
#### SEE ALSO:

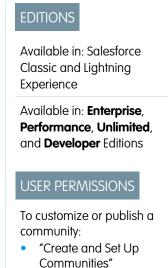
Which Components Can I Use with Each Template?

# Visualforce Page Component

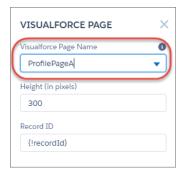
Use the Visualforce Page component to add existing Visualforce pages to the pages of your Customer Service (Napili)-based community.

1. In Community Builder, drag the Visualforce Page component from the Components panel onto the page.





**2.** Edit the component to select the Visualforce page to use. If you installed the Salesforce CPQ (Steelbrick) app, those pages are also available for selection here.



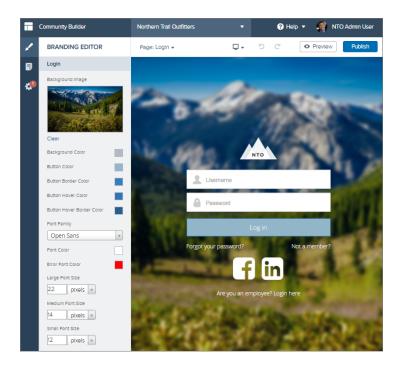
- 3. Adjust the height as you like.
- 4. Optionally, specify a Record ID if the Visualforce page. Typically, the system populates this value depending on context.
  - Tip: If the Visualforce page requires the Record ID from an object such as Account, create object pages for Account. Then drag and drop the Visualforce Page component onto the object's detail page. The Record ID field adjusts to the object's ID.

# **Login Components**

# Brand the Login Pages

Use the Community Builder to customize and brand the login pages with your own design. You can change the appearance of the login pages with a background image, color scheme, and font settings. Use Community Builder to set the background. Your preference applies to all login pages, unless you override the settings within an individual page.

- 1. Select Go To Community Builder, if you're not already in it.
- 2. From the Go To menu, select Login.
- 3. In the left pane, upload an image for the background, and set color and text preferences, as needed.
- **Example**: The Branding Editor settings in Community Builder:



## SEE ALSO:

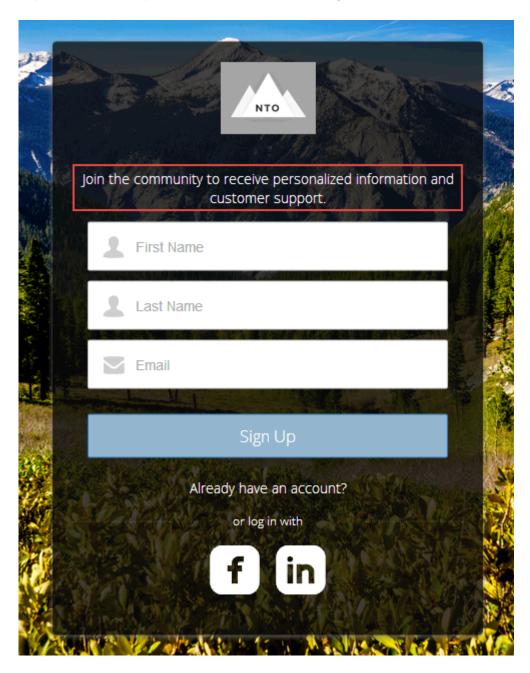
Which Components Can I Use with Each Template?

# Set Up the Content Block

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

- 1. In Site.com Studio, select the **Content Heading** or **Content Description** component in the page that you're configuring.
- 2. Click 🙇.
- 3. Select Edit HTML.
- **4.** Enter the text that you want to display on the page.

**Example:** Sample Content Block component with an introduction to a self-registration form:



## SEE ALSO:

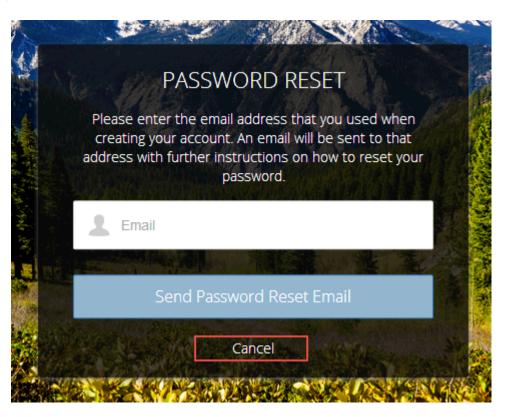
Which Components Can I Use with Each Template?

# **Custom Code**

Use Custom Code components to send users to a specific page within your community.

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

- 1. In Site.com Studio, select the **Custom Code** component in the page you're configuring.
- 2. Click 🚓 .
- Select Edit.Edit the JavaScript code to change the navigation or behavior when the user clicks the component.
- 4. Click Save and Close.
- **Example**: Sample Custom Code component as a Cancel button to direct users back to the main login screen if they decide not to reset their password:



SEE ALSO:

Which Components Can I Use with Each Template?

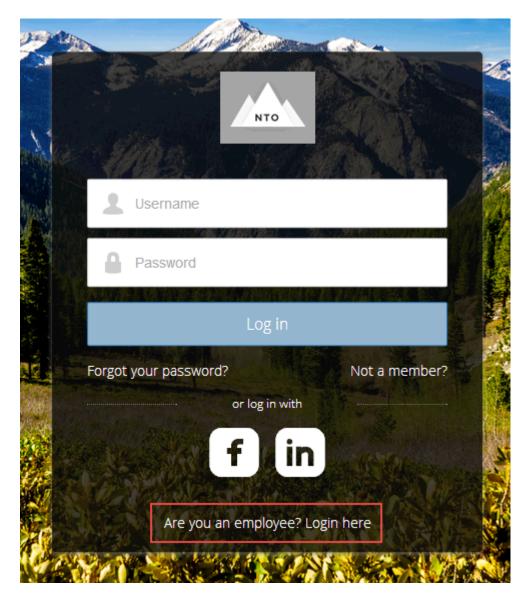
# Employee Login Link

Use the Employee Login Link component to direct users with accounts in the community's parent org to their login page. When your employees or other users who have accounts in the parent org for the community end up on the community login page, you can redirect them to their own login page with a link. They can then log in with all the settings and permissions of their org account.

- 1. Select the **Employee Login Link** component in the page that you're configuring.
- **2.** In the property editor, configure properties for the component:

Property	Details	
Employee Login Link	Enter text that identifies the login option for employees. The label appears as clickable text	
	on the page. The default text is Are you an employee? Login here.	

**Example:** Sample Employee Login Link component:



SEE ALSO:

Which Components Can I Use with Each Template?

# Forgot Password

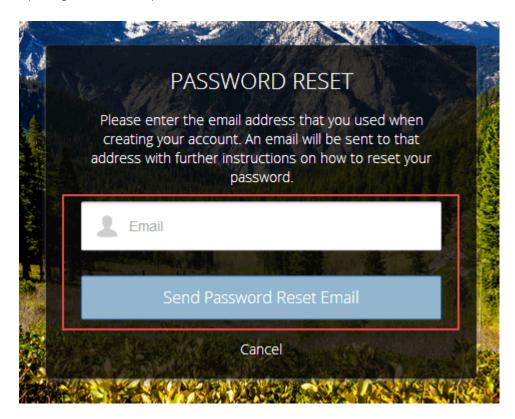
Use the Forgot Password component to let users request a new password.

Sometimes users forget their existing passwords and need a new one. The Forgot Password component gives users the ability to get one without contacting an administrator. The user enters the email address that's associated with the account, clicks the button, and gets email instructions for resetting the password.

- 1. Select the **Forgot Password** component in the page that you're configuring.
- 2. In the property editor, configure properties for the component:

Property	Details
Check Email URL	Enter the view or path to the page that notifies the user when the password has been reset and an email has been sent.
Username Label	Enter the text that appears in the field where the user enters a valid username, which can be in the form of an email address if users are identified that way.
Submit Button Label	Enter the text for the button that the user clicks to make the password reset request.

**Example:** Sample Forgot Password component:



#### SEE ALSO:

Which Components Can I Use with Each Template?

# Login Form

Let users log in with login fields for a username and password and a button for submitting both.

The **Login Form** component is a simple username and password form that lets users with an existing account log in to the community.



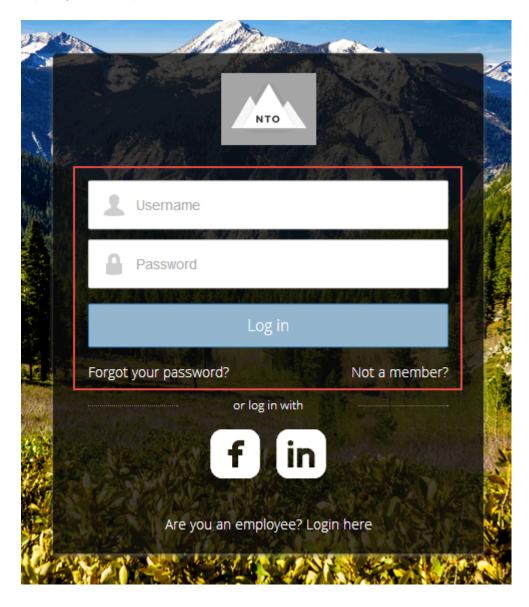
Note: If the community administrator deselects the username and password checkbox on the Administration > Login & **Registration** page in Community Management, the Login Form doesn't appear in the published community. For more information, see "Customizing Communities Login" in the Salesforce Help.

- 1. Select the **Login Form** component in the page that you're configuring.
- **2.** In the property editor, configure properties for the component:

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



**Example:** Sample Login Form component:



SEE ALSO:

Which Components Can I Use with Each Template?

# Self-Registration

The Self-Registration component lets users set up their accounts so that you don't have to add each one manually. Users put their information into the form fields, and when they click **Sign Up**, an account is created for them. This component has a basic set of fields that you can customize, and you can add more fields.

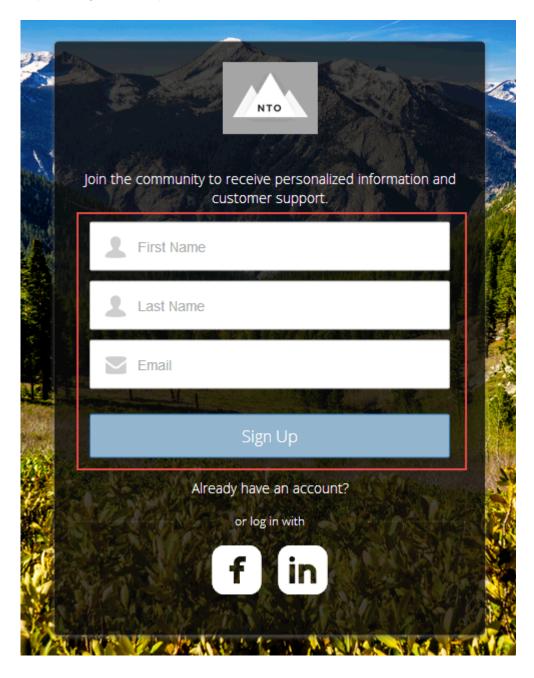
For this component to appear, go to Community Management and select **Administration** > **Login & Registration** > **Allow external users to self-register**.

1. Select the **Self Registration** component in the page that you're configuring.

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

Property	Details
Account ID	Enter the variable expression for the account ID to associate with new users.
Start URL	Enter the path to the page that users see after they log in. This page is the home page for the community.
Registration Confirmation URL	Enter the path to the page to display after the user submits the self-registration form.
First Name Label	Enter the label text for the user's first name.
Last Name Label	Enter the label text for the user's last name.
Email Label	Enter the label text for the user's email address.
Password Label	Enter the text for the password field label.
Confirm Password Label	Enter the text for the field in which a user confirms the password. This field usually requests that the user retype the proposed password to make sure that it's correct.
Submit Button Label	Enter the text for the button to submit the form values.
Include Password Field?	Select this option if you want self-registering users to pick their own passwords. Otherwise, password information is provided in the email that they receive after they submit the form.
Extra Fields Field Set Name	Optionally, add fields to the form. If you've created a field set by using our API, enter the variable that's associated with the field set here. For example, you can write code that creates a field set to collect a phone number or other information.

Example: Sample Self-Registration component:



## SEE ALSO:

Which Components Can I Use with Each Template?

# Social Login

The Social Login component provides users with icons that they can click to log in to a third-party account, such as Facebook<sup>©</sup> or LinkedIn<sup>©</sup>. Set these icons for each authentication provider that you configure for the org.

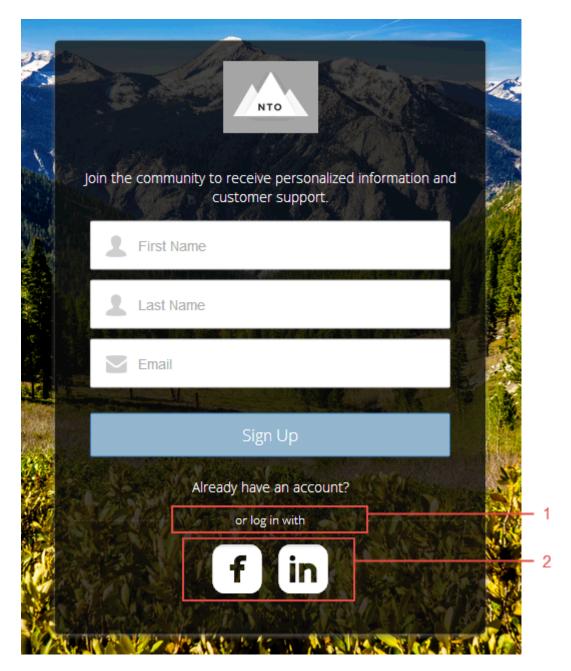
Some users prefer to use an existing account with a service such as Facebook to log in to the community instead of setting up a new account and password. The third-party service is an authentication provider that verifies the identification of the user. Use the Social Login component to add an icon for each supported authentication provider. The user clicks the icon and logs in using the associated account's username and password.

Before you add the Social Login component, set up each authentication provider. For more information, see "Configuring Authentication Providers" in the Salesforce Help.

- 1. Select the **Social Login** component in the page that you're configuring.
- **2.** In the property editor, configure properties for the component:

Property	Details
Show Header	Select this option to show a text header above the authentication header icons.
Header Text	Enter the text for the header text.

**Example:** Sample Social Login component with "or log in with" text (1) and authentication provider icons (2):



# SEE ALSO:

Which Components Can I Use with Each Template?

# Customize Communities with Community Builder

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

#### IN THIS SECTION:

#### Community Builder Overview

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

# Manage Your Community's Pages and Their Properties in Community Builder

The Pages menu and Page Properties centralize all your page-related needs, from page creation to audience criteria-based page visibility and everything in between.

## Track Community Users with Your Google Analytics Tracking ID

Add your Google Analytics<sup>™</sup> tracking ID to track page views in your community. Enable access to your Salesforce data for deeper insights. Then, adjust your community's pages to more accurately reach your customers.

# 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 and Lightning Experience

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

# **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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.

#### IN THIS SECTION:

## Navigate Community Builder

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

#### Brand Your Community with Community Builder

Use Community Builder's Branding panel 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.

## 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.

## Preview Your Community with Community Builder

Preview how your community appears in a desktop browser window and on mobile devices.

#### Publish Your Customizations with Community Builder

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

#### SEE ALSO:

Navigate Community Builder

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 Workspaces or Community Management, click
   Community Workspaces > Go to Builder or Community Management > Go to Community
   Builder.
- From the All Communities page in Setup, click **Community Workspaces** or **Builder** next to the community name. In Community Workspaces, click Builder.
- From a community, click **Community Builder** in the profile menu.

In Community Builder, you can:

- Drag and drop Lightning components onto your page (1). The Components panel includes custom Lightning components from the AppExchange.
- Brand the community to match your organization's style (2).
- View all the components on the current page. Select a component to edit its properties. (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.
  - Open Community Workspaces or Community Management to manage community analytics, login, registration, reputation, topics, and other settings.
  - Return to Setup.
- Navigate to the community page that you want to edit using the **Pages** menu and **Page Variation** menu (6). Manage, create, delete, and set the visibility of pages in Page Properties for each page.
- See how your community appears on different devices (7).
- Preview the community in a new browser window (8).
- Publish your changes to make your updates available to everyone in your community (9).

# **EDITIONS**

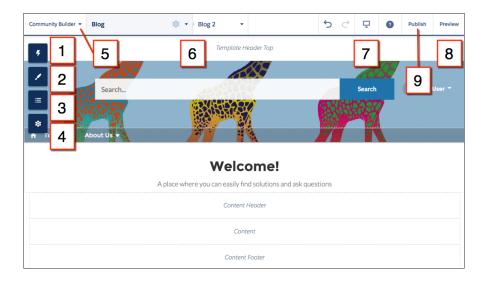
Available in: Salesforce Classic and Lightning Experience

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

## **USER PERMISSIONS**

To create, customize, or publish a community:

 "Create and Set Up Communities"



#### 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 Branding panel 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 panel.

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.
- Specify font family, style, and weight.
- Change header and page background color, font family, font size, and font color.
- Use custom CSS to apply your own styles.

# **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

# **USER PERMISSIONS**

To create, customize, or publish a community:

 "Create and Set Up Communities"



When you upload your own logo in the Branding panel, Community Builder extracts its colors behind the scenes, and suggests a set of colors based on those colors. 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. Select the page that you want to brand in the Pages menu on the top toolbar.
- **2.** Define branding. Your changes are saved automatically and appear instantly on the page canvas.

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

## SEE ALSO:

Community Builder Overview

Preview Your Community with Community Builder

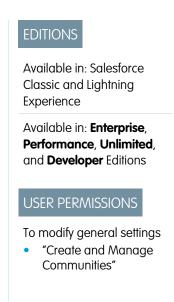
Implementation Guide: Using Templates to Build Communities

# 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 Template**

Displays the name and version of the template that your community is using.

# **Page Access**

Specifies the level of access to the page. When you enable public access, guest users can view asset files on public pages by default. Users whose profile settings are more restrictive may not be able to view this page, even if you choose Public.

When you enable public access, the preference **Let guest users view asset files on public pages** in **Administration** > **Preferences** is automatically enabled.

#### **Community Title**

Lets you set the title for your community. The title briefly appears in the browser's title bar before your community's Home page loads.

#### **Published Status**

Indicates whether your community is published. If it's published, click the link to open the live community in a separate browser tab.

#### **Guest User Profile**

Displays the associated guest user profile. Clicking the link takes you to the Profile page in Salesforce Setup, where you can modify profile settings, such as which permissions the guest user has. For more information about configuring the guest user profile, see "Configure the Guest User Profile for Unauthenticated Users" in the *Using Templates to Build Communities Guide*.

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

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

• In the Theme area, you can control the layout and appearance of each page in your community.

- 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.

(Important: As of Spring '17, we no longer support Koa, Kokua, and Customer Service (Napili) template versions from before Winter '16 (October 2015). If your community uses a pre-Winter '16 template and you don't update it now, members lose access to your site in the Spring '17 release.

If your community uses a template version that's later than Winter '16, 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 Spring '17
After Winter '16 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)	<ul> <li>Your customizations are maintained for all pages, except login pages.</li> <li>Login pages retain branding but lose custom code or component customizations.</li> </ul>
Before Winter '16 Koa, Kokua, or Customer Service (Napili)	Most component customizations and properties are overwritten. However:
Before Spring '16 Aloha template	<ul> <li>For Koa and Kokua, general settings, such as Category Group Name, Top-Level Category, and Company Name, carry over.</li> <li>For Customer Service (Napili), topic definitions carry over.</li> </ul>
	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.

# **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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 Spring '17
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.



To update your template (for Winter '16 or earlier versions of templates):

- In Community Builder, click > **Updates**.
- 2. Click **Update** and confirm the update when prompted.
- 3. Review all community pages and make sure that your branding and styles are as you expect.
- 4. 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.



Available in: Salesforce Classic and Lightning Experience

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

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

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

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.



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

# **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

# USER PERMISSIONS

To create, customize, or publish a community:

"Create and Set Up Communities"

# 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.

- (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.** In Community Builder, preview your community to make sure that your updates appear as expected.
- **2.** When you're happy with your changes, click **Publish** in the toolbar to publish your changes. An email notification informs you when your changes go live.

#### SEE ALSO:

Community Builder Overview

Preview Your Community with Community Builder

Implementation Guide: Using Templates to Build Communities

# **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

# **USER PERMISSIONS**

To create, customize, or publish a community:

"Create and Set Up Communities"

# Manage Your Community's Pages and Their Properties in Community Builder

The Pages menu and Page Properties centralize all your page-related needs, from page creation to audience criteria-based page visibility and everything in between.

From the Pages menu (1), you can:

- Search for a page and click (2) to edit its properties (3).
- Create alternative variations of the selected page and, in Customer Service (Napili), set audience criteria-based page visibility (4).
- Create custom pages (5).
- Delete the selected page and its variations (6).

# **EDITIONS**

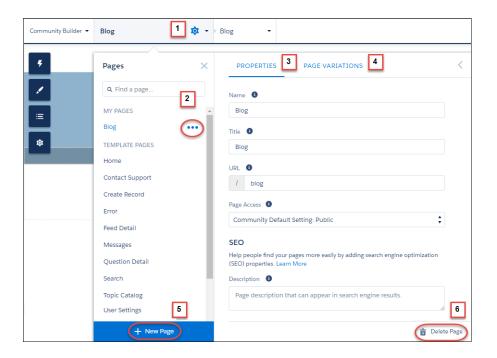
Available in: Salesforce Classic and Lightning Experience

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

# **USER PERMISSIONS**

To customize or publish a community:

 "Create and Set Up Communities"



#### IN THIS SECTION:

#### Page Properties and Types in Community Builder

Use the Pages menu and Page Properties to view and edit the properties of the various pages that make up your community.

#### Edit Community Pages and Components in Community Builder

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

#### Create Custom Pages with Community Builder

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

## Control Public Access for Each Page in Your Community

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

## Add Markup to the Page <head> to Customize Your Community

Add custom analytics, improve your SEO results, and more by adding custom markup to the page <head> in Community Builder. For example, you can include SEO meta tags that are visible only to search engines or add a *favicon* or web page icon.

## Page Variations and Audience Targeting for Pages and Groups

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

## Custom Theme Layouts and Theme Layout Types

Theme layouts and theme layout types combine to give you granular control of the appearance and structure of each page in your community. Customize the layout's header and footer to match your company's style, configure theme properties, or use a custom search bar and user profile menu. Then use theme layout types to apply a theme layout to individual pages and quickly change layouts from one central location. Whether you're a consulting partner or an ISV, or you simply want to revamp your own community, custom theme layouts make it easy to rebrand.

## Change the Content Layout in Community Builder

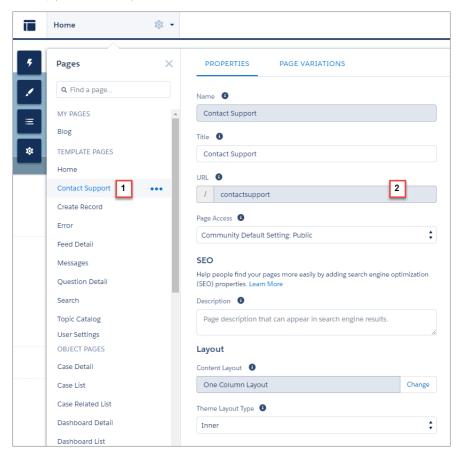
Quickly change the look of your community's pages by switching to a different layout. You can even create your own custom layouts in the Developer Console and import them to use in your community.

## Use Visualforce in Customer Service (Napili) Communities

If you have created Visualforce pages, actions, buttons, links, and canvas apps for your Salesforce Tabs + Visualforce template-based communities, you can reuse those elements in Customer Service (Napili)-based communities.

# Page Properties and Types in Community Builder

Use the Pages menu and Page Properties to view and edit the properties of the various pages that make up your community.





# Page Types (1)

We've grouped your community's pages by type in Pages menu.

## My Pages

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

## **Template Pages**

The default pages that come with the community template.

# **Objects**

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

## **Generic Record Pages**

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 URI

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.

#### Page Access

Specifies the level of access to the page. When you enable public access, guest users can view asset files on public pages by default. Users whose profile settings are more restrictive may not be able to view this page, even if you choose Public.

When you enable public access, the preference **Let guest users view asset files on public pages** in **Administration** > **Preferences** is automatically enabled.

# Description

Used for search engine optimization purposes and appears in search engine results. Available for the Contact Support, Error, Home, and Topic Catalog template pages, and all pages listed under My Pages and Login Pages.

#### **Content Layout**

Defines the content regions of your page, such as a two-column layout.

#### Theme Layout Type

Applies a theme layout type and its associated theme layout to the page.

## SEE ALSO:

Change the Theme Layout of Your Community's Pages

Change the Content Layout in Community Builder

Set Up Search Engine Optimization (SEO) for Your Community

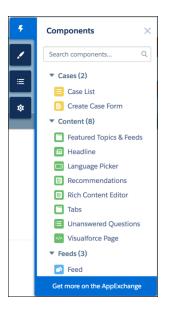
Lightning Components Developer Guide: Create Custom Content Layout Components for Communities

# Edit Community Pages and Components in Community Builder

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

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

- 1. From the Pages menu in the top toolbar, select the page that you want to edit.
- **2.** Click **5** to open the Components panel.



# **USER PERMISSIONS**

To customize or publish a community:

 "Create and Set Up Communities"

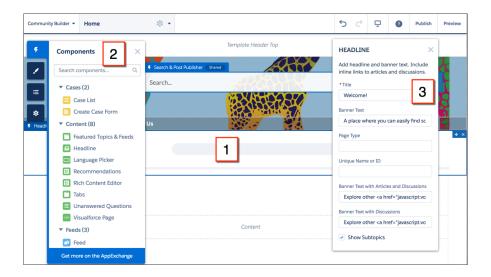
The Components panel lists only components that are compatible with the selected page. For example, you can't add the User Profile Detail component to the Home page.

3. Drag the required component from the Components panel onto an editable area of the page.

When you drag a component over a content or theme layout region, a label appears to help you identify the region. Components in theme layout regions are shared everywhere that theme layout region is used and we add the label "Shared" to the component name. Components in a content layout region are specific to the page.



- **4.** To edit the properties for a component on the page, select it on the main page canvas or on the Page Structure panel. When you select a component, Community Builder highlights the component with a blue border and displays the component's properties in the floating property editor.
- **5.** Update the component as required.
- Example: Here's a sample configuration of the Headline component (1) on the Home page with the list of supported Lightning components (2) and properties (3).



# Tip:

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

#### 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.



Available in: Salesforce Classic and Lightning Experience

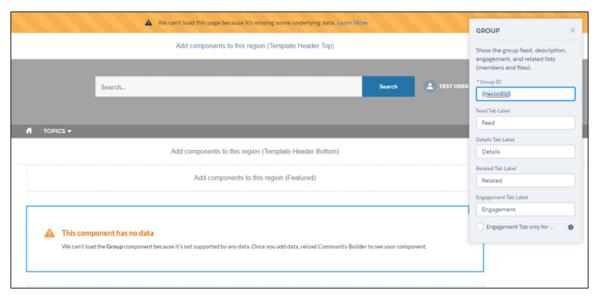
Available in: Enterprise, Performance, Unlimited, and **Developer** Editions

⚠ 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.

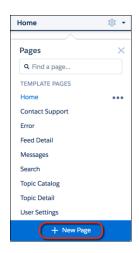
- Home: Associate a Data Category with the template.
- Article Detail: Create at least one Salesforce Knowledge article in your org.

- 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.

# Create Custom Pages with Community Builder

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

- 1. In Community Builder, open the Pages menu on the top toolbar.
- 2. Click New Page at the bottom of the Pages menu.



# Available in: Salesforce Classic and Lightning Experience

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

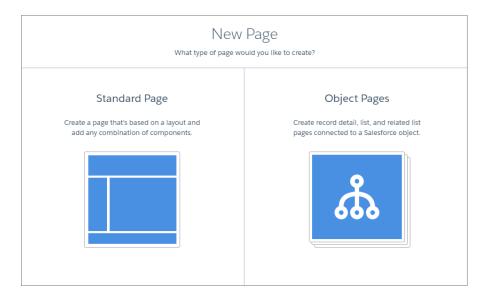
# **USER PERMISSIONS**

To create pages in Community Builder:

 "Create and Manage Communities

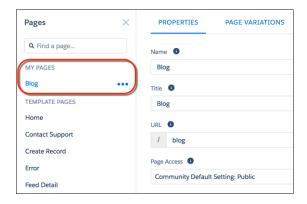
## 3. To create:

- A standard page that's based on a blank layout or a preconfigured page (if available), click **Standard Page**.
   If you don't have preconfigured pages, choose a blank layout. Alternatively, if you do have preconfigured pages (because you've exported or imported custom pages), choose one to customize or click **New Blank Page** to select a blank layout.
   Click **Next**, give the page a unique name, and specify the static portion of the page's URL.
- A detail, a list, and a related list page associated with one of your Salesforce objects, click **Object Pages** (in Customer Service (Napili) only). Select the object that you want to associate with the page.

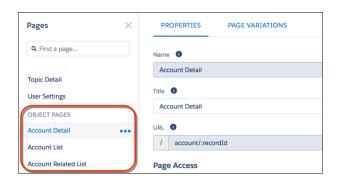


#### 4. Click Create.

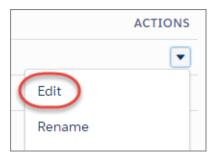
Custom standard pages that are based on a layout appear under My Pages in the Pages menu. Pages that are based on a default template page appear under its Page Variations section.



Custom object pages appear under Object Pages.



5. Open a standard page by selecting it, or open an object page by clicking > **Edit** in the Page Variations section.



- **6.** Add and configure page components.
- 7. If you're using the Customer Service (Napili) template, set the page's visibility.
- 8. Preview and publish your community when you're done.



Tip:

• In Page Properties, you can quickly create alternative versions of the page in the Page Variations tab. For example, you could create three different Question Detail pages to test out various layouts or styles, or to assign them to different audiences. To create a page variation, click **New Page Variation** in the Page Variations tab.

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

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

#### IN THIS SECTION:

## Delete a Page in Community Builder

Remove a community page or page variation that you no longer need by deleting it in Page Properties.

# Delete a Page in Community Builder

Remove a community page or page variation that you no longer need by deleting it in Page Properties.

Keep in mind that you can't delete:

- The default pages and objects that come with the template
- A page's default page variation
- A custom object page (detail, list, or related list) but you can delete the entire object

To delete a page or page variation:

- 1. In Community Builder, open the Pages menu.
- 2. Open Page Properties for the page that you want to delete. Click beside the page on the top toolbar, or click beside the page in the Pages dropdown menu.

# EDITIONS

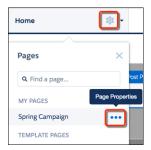
Available in: Salesforce Classic and Lightning Experience

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

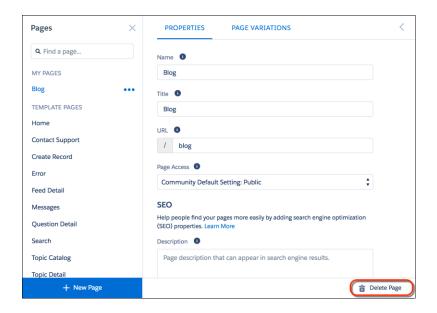
# USER PERMISSIONS

To customize or publish a community:

 "Create and Set Up Communities"



3. To delete the page and its page variations (if available), click **Delete Page** on the Properties tab. To delete a page variation, click **Delete** on the Page Variations tab.



# Control Public Access for Each Page in Your Community

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

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



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

#### **Community Default Setting**

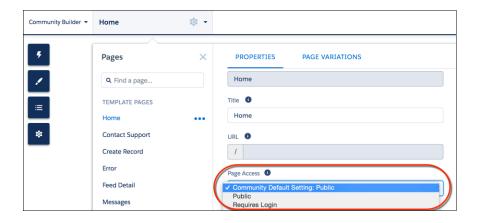
Reflects your choice for Public Access under General Settings. If you allow public access, your community pages are accessible to the public, including unlicensed users by default. If not, members must log in to access the community.

#### **Public**

Makes the page public, regardless of the community's default setting.

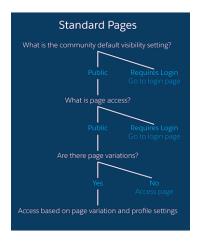
#### **Requires Login**

Makes the page private and requires members to log in, regardless of the community's default setting.



How do these settings work with audience criteria-based page visibility in Community Builder? When a member is trying to access a page, we first check the community's default setting. Is it public or does it require users to log in? After that first check, we look at the page access. Once that's cleared, we finally check the audience criteria-based visibility you set in Page Variations.

How does this logic work for standard pages?



And what's the logic behind pages that show object data?



You can also set privacy settings at the component level for some components, such as the Tabs and the Navigation Menu components. To make a component on a public page visible to guest users, select the **Publicly available** check box in the component's properties.

# Important:

- There are some exceptions to the rule. Some pages are always public, while others are always private. Public pages include login-related pages (Login, Register, Forgot Password, Login Error, Check Password). The Messages page (for direct messages) is always private.
- If public access is enabled in Community Builder at the page or community level, the **Let guest users view asset files on public pages** preference is enabled in **Administration** > **Preferences** in Community Workspaces or Community Management. This preference lets guest users view asset files shared with the community on publicly accessible pages. It remains enabled as long as any page has public access enabled.
- When you add custom components to your community, they can bypass the object- and field-level security (FLS) you set for
  the guest user profile. Lightning components don't automatically enforce CRUD and FLS when referencing objects or retrieving
  the objects from an Apex controller. This means that the framework continues to display records and fields for which users
  don't have CRUD permissions and FLS visibility. You must manually enforce CRUD and FLS in your Apex controllers.

# Add Markup to the Page <head> to Customize Your Community

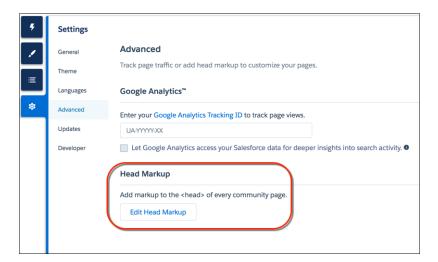
Add custom analytics, improve your SEO results, and more by adding custom markup to the page <head> in Community Builder. For example, you can include SEO meta tags that are visible only to search engines or add a *favicon* or web page icon.

For security purposes, we restrict the tags, attributes, and values allowed in the head markup of your pages.

Important: Before LockerService is automatically activated for all orgs in the Summer '17 release, make sure that any existing head markup contains only the allowed tags, attributes, and values. In Summer '17, invalid head markup will be disabled.

Allowed Tags	Allowed Attributes
<base/>	href, target
<li><li><li><li></li></li></li></li>	as, charset, crossorigin, disabled, href, hreflang, id, import, integrity, media, rel, relList, rev, sheet, sizes, target, title, type  1 For rel, allowed values are alternate, apple-touch-icon, apple-touch-icon-precomposed, apple-touch-startup-image, author, bookmark, external, help, icon, license, manifest, next, nofollow, noopener, noreferrer, pingback, prefetch, preload, prev, search, shortcut icon, stylesheet, and tag.
<meta/>	charset, content, http-equiv, <sup>2</sup> name, scheme <sup>2</sup> For http-equiv, allowed values are cleartype, content-type, content-language, and default-style.
<title>&lt;/td&gt;&lt;td&gt;None allowed&lt;/td&gt;&lt;/tr&gt;&lt;/tbody&gt;&lt;/table&gt;</title>	

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



## 2. Click Edit Head Markup.

# **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

# **USER PERMISSIONS**

To customize or publish a community:

"Create and Set Up Communities"

- 3. Enter the required HTML.
- 4. Save your changes.

When you add custom markup, the code is added to the <head> of every page.

**(3)** 

**Example**: Here we've added HTML to include a favicon on our community's pages.

# Page Variations and Audience Targeting for Pages and Groups

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



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

### **Page Variations**

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

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

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

Assigning specific audience criteria to a page variation lets you target a particular set of members. Criteria include:

- Profile
- Location
- Record type

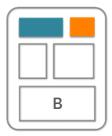
You can add multiple profiles to a variation if you like, or none.

Here are some considerations when setting location criteria:

- Location based on the user's IP address, which could potentially be located in a neighboring city.
- The location permission is not on by default in Developer Edition orgs. Contact Salesforce if you want to use this feature in that edition.
- Location criteria don't work in countries that don't allow the use of the Google API.
- **Example**: Let's say you have a financial services community and you want your clients and your brokers to see a different Home page based on their profile. You can create two variations of the Home page, each with content targeting a specific audience—clients

and brokers in this case—and set the visibility of each page to different profiles. All members go to the same URL, but your clients see Home A, whereas your brokers see Home B.





### Who Exactly Sees What?

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

### Default: All users unless set by profile

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

### By Profile

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

#### None

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

### IN THIS SECTION:

### Manage Audience Targeting for Pages and Groups in Communities

Combine audience criteria to control which page is visible to your community members, creating a custom experience and even custom groups.

# Manage Audience Targeting for Pages and Groups in Communities

Combine audience criteria to control which page is visible to your community members, creating a custom experience and even custom groups.



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

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

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

# **EDITIONS**

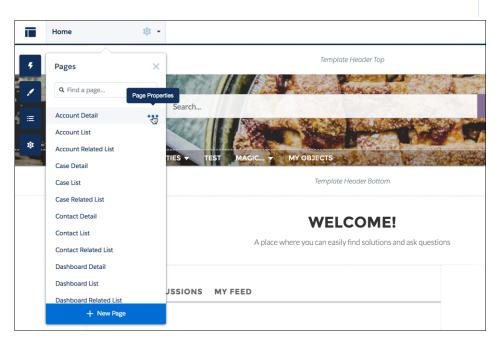
Available in: Salesforce Classic and Lightning Experience

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

### **USER PERMISSIONS**

To customize or publish a community:

"Create and Set Up Communities"



- 2. Hover over the page name to bring up the ellipsis.
- 3. Click on the ellipsis to bring up the page options.
- 4. Open the Page Variations tab.
- 5. Under Actions, click > Set Audience Criteria.
- **6.** Select the criteria that you want for your audience.
- 7. To update the visibility settings of:
  - An unpublished page, click Save. The visibility changes don't go live until you publish your community.
  - A published page variation, click Publish Visibility Changes. The visibility changes go live immediately, but any other pending changes must be published separately.

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

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

# Custom Theme Layouts and Theme Layout Types

Theme layouts and theme layout types combine to give you granular control of the appearance and structure of each page in your community. Customize the layout's header and footer to match your company's style, configure theme properties, or use a custom search bar and user profile menu. Then use theme layout types to apply a theme layout to individual pages and quickly change layouts from one central location. Whether you're a consulting partner or an ISV, or you simply want to revamp your own community, custom theme layouts make it easy to rebrand.



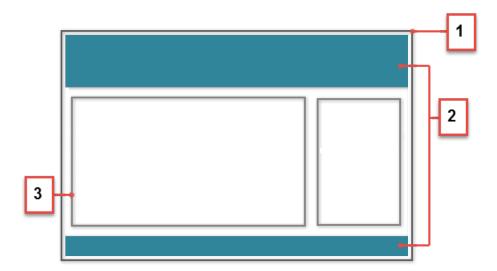
**Note**: This functionality is available in communities based on the Customer Service (Napili) template and Lightning Bolt solutions.

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



Available in: Salesforce Classic and Lightning Experience

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

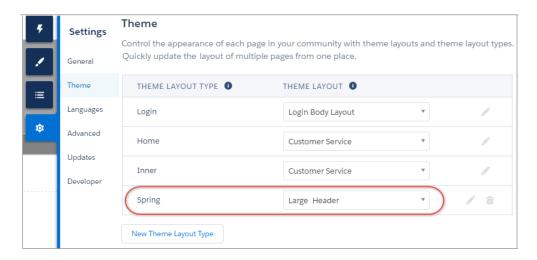


A theme layout type categorizes the pages in your community that share the same theme layout. You can assign a theme layout to an existing type or create custom types. Then you apply the theme layout type—and thereby the theme layout—in the page's properties.

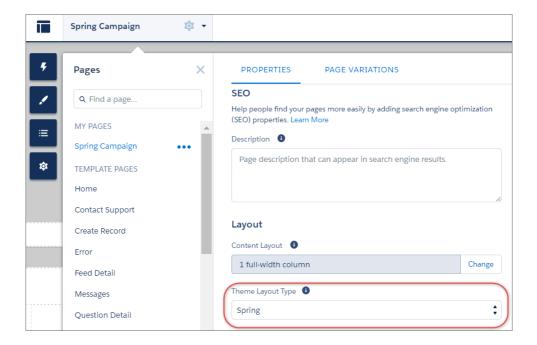
Customer Service (Napili) includes the following theme layouts and types, but you can create custom types or switch layouts as needed.

- Home applies the Customer Service theme layout to all pages, except the login pages.
- Login applies the Login Body Layout theme layout to the login pages.
- Inner isn't applied to any pages. However, the Home and the Inner theme layout types are ideal for applying separate theme layouts when you want your home page to look different from the other pages in your community.
- Note: A developer creates custom theme layout components in the Developer Console by implementing the forceCommunity:themeLayout interface.

Example: Let's say you create three pages for your upcoming Spring campaign. You want them to use the Large Header theme layout that your developer created. In the **Settings** > **Theme** area, you add a custom theme layout type called Spring to categorize these pages and assign the Large Header layout to it.



Next, you apply the Spring theme layout type in each page's properties, which instantly applies the Large Header layout to each page.



Everything looks rosy until your VP of marketing decides that the header takes up too much room. That's an easy fix, because you don't have to update the properties of each page to change the theme layout. Instead, with one click in the Theme area, you can switch Spring to the Small Header layout and instantly update all three pages!





**Example**: Now let's say that the Small Header layout includes two custom properties—Blue Background and Small Logo—which you've enabled and applied to all your campaign pages. However, for one page, you want to apply only the Small Logo property.

In this case, you could create a theme layout type called Spring B, assign the Small Header layout to it, and enable Small Logo. Then, you apply the Spring B layout type to the page.



Theme layout types make it easy to reuse the same theme layout in different ways while maintaining as much granular control as you need.

### SEE ALSO:

Change the Theme Layout of Your Community's Pages

Lightning Components Developer Guide: Create Custom Theme Layout Components for Communities
Lightning Components Developer Guide: Create Custom Search and Profile Menu Components for Communities

### Change the Theme Layout of Your Community's Pages

A theme layout defines the top-level regions of your page, such as the header and footer, navigation, search, and the user profile menu. A theme layout type categorizes the pages in your community that share the same theme layout.

A developer creates custom theme layout components in the Developer Console by implementing the forceCommunity: themeLayout interface. The developer can also add properties to a custom theme layout, which you can configure in the Theme area in Community Builder. When the component is available, select the new theme layout to instantly transform the pages it applies to.



**Note**: This functionality is available in communities based on the Customer Service (Napili) template and Lightning Bolt solutions.

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

# **EDITIONS**

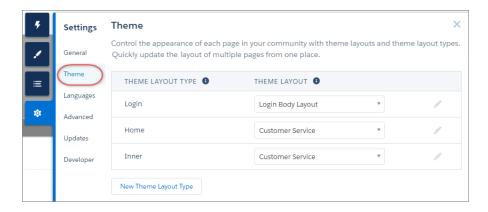
Available in: Salesforce Classic and Lightning Experience

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

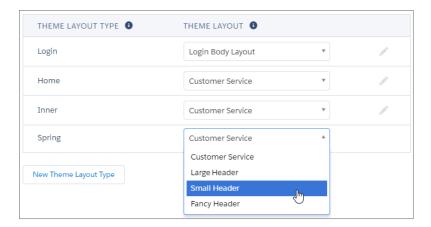
### **USER PERMISSIONS**

To customize or publish a community:

 "Create and Set Up Communities"



- 2. If necessary, create a theme layout type.
- **3.** Assign the theme layout to the theme layout type.



**4.** Update the theme layout's settings, if available. The properties vary depending on how your developer has configured the theme layout.



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

### Hide the header region and navigation

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

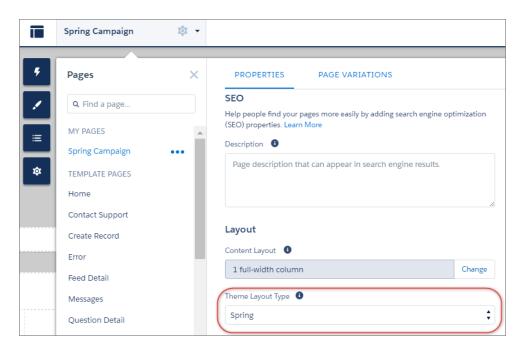
### **Search Component**

Replaces the default Search and Post component with a custom component, if available.

### **User Profile Component**

Replaces the default Profile Header component with a custom version, if available.

- ? Tip: A developer can create a custom search component using the forceCommunity:searchInterface or a custom user profile component using the forceCommunity:profileMenuInterface in the Developer Console.
- **5.** Apply the theme layout to a page by selecting the theme layout type in the page's properties.



### SEE ALSO:

Custom Theme Layouts and Theme Layout Types

Page Properties and Types in Community Builder

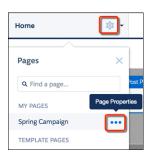
Lightning Components Developer Guide: Create Custom Theme Layout Components for Communities

Lightning Components Developer Guide: Create Custom Search and Profile Menu Components for Communities

# Change the Content Layout in Community Builder

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

- Note: This functionality is available in the Winter '16 and later versions of the Koa, Kokua, and Customer Service (Napili) templates and the Spring '16 and later versions of the Aloha template.
- 1. In Community Builder, open the page's properties. Click beside the page on the top toolbar, or click beside the page in the Pages dropdown menu.



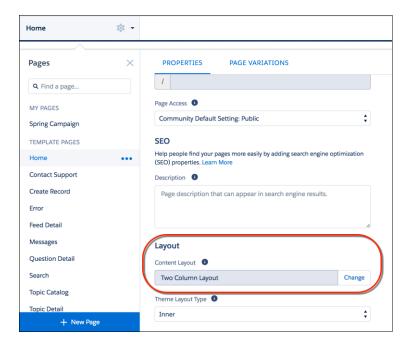


USER PERMISSIONS

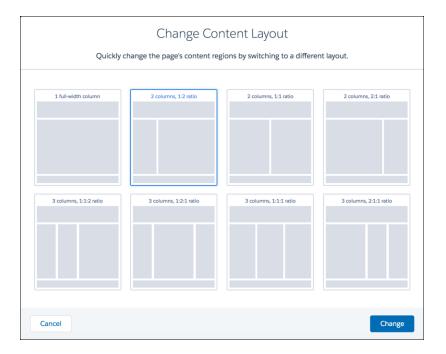
To customize or publish a community:

 "Create and Set Up Communities"

2. In Properties, click **Change** in the Layout section.



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



### 4. Click Change.

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

**Ø** 

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

# Use Visualforce in Customer Service (Napili) Communities

If you have created Visualforce pages, actions, buttons, links, and canvas apps for your Salesforce Tabs + Visualforce template-based communities, you can reuse those elements in Customer Service (Napili)-based communities.

For example, say that you have the Salesforce CPQ (Steelbrick) app installed in your org. You can create a quote detail page and use the Visualforce Page component to display the quote line editor or other pages. If you have configured actions, buttons, and links, associated with standard or custom objects, they work in communities as well. And canvas app overlays let you host third-party applications in your community.

- 1. Give Visualforce page access to users by profile.
  - a. From Setup, enter *Profiles* in the Quick Find box, then select Profiles.
  - **b.** Click the name of the profile you want to modify.
  - c. On the Profile page, click **Enabled Visualforce Page Access**.
  - **d.** In the **Enabled Visualforce Page Access** section of the Profile page, click **Edit**.
  - **e.** In the Available Visualforce Pages list, select the Visualforce pages that you want to make available to this profile and then click **Add**.

# **EDITIONS**

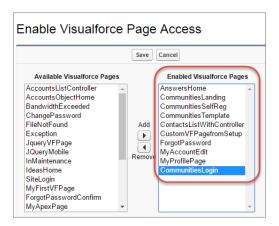
Available in: Salesforce Classic and Lightning Experience

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

### **USER PERMISSIONS**

To customize or publish a community:

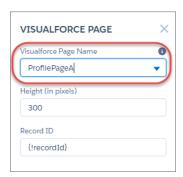
 "Create and Set Up Communities"



- f. Click Save.
- 2. Make the Visualforce page available for your community.
  - a. From Setup, enter Visualforce Pages in the Quick Find box, then select Visualforce Pages.
  - **b.** Click **Edit** for the page you want to make available for your community.
  - c. Select Available for Salesforce mobile apps and Lightning Pages and click Save.



**Visualforce Page Component**—To add a Visualforce page to your Customer Service (Napili) community, drag and drop the Visualforce Page Component from the Components panel to the page. Select the Visualforce page you want to use in the property editor.



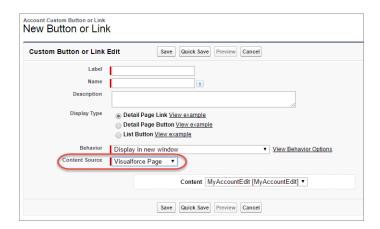
Tip: If the Visualforce page requires the Record ID from an object such as Account, create object pages for Account. Then drag and drop the Visualforce Page component onto the object's detail page. The Record ID field adjusts to the object's ID.

**Custom Actions**—If you have custom actions with an action type of **Custom Visualforce** associated with a Visualforce page, these actions work in published communities. When users click the action button, the associated Visualforce page displays.



(1) Important: Overrides to standard Visualforce actions such as View, New, Edit, and Delete are not supported in communities. These buttons on record detail pages don't display in communities.

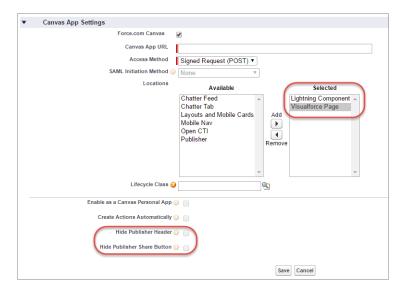
**Custom Buttons and Links**—If you have custom buttons and links with a content source of Visualforce Page, these buttons and links work in published communities. When users click the button or link, the associated Visualforce page displays.



Note: The Behavior setting for custom buttons and links is not supported. When users click custom buttons in published communities, the Visualforce page is always displayed in the current window.

Visualforce custom list buttons are not supported in communities.

**Canvas Apps**—You can use canvas apps as custom actions to give users access to the functionality of your apps in communities. Configure your canvas app for Lightning Component and Visualforce Page in Canvas App Settings. You can then load the canvas app inside a Visualforce page, Visualforce action, and Lightning components in published communities.





**Note**: Canvas quick actions are not available for guest users.

You can opt to hide the publisher header and publisher Share button in Canvas App Settings.

### **Best Practices for Using Visualforce in Communities**

- **Community Branding**—When developing your Visualforce page code, set the showHeader attribute to true. That way, branding properties you set in **Administration** > **Branding** in Community Workspaces or Community Management also apply to the Visualforce page component in your Customer Service (Napili) community. To modify the default gray background for Visualforce components, change the **Header Background** property on the Branding page.
- **Mobile**—To enable Visualforce pages to display community branding on mobile, set standardStylesheets=true or showHeader=true in your Visualforce page code.
- **URLs**—If your Visualforce page contains links to other Visualforce pages, ensure that the Visualforce markup includes http://orhttps://at the start of the URL. Also, if your page is locked in a frame, use the target="\_top" attribute to open the page in the full body of the window. For example,

```
<a href="https://yourVFpageURL.com" target=" top" >Name of Visualforce Page</a>
```

• JavaScript Sources—Use JavaScript sources such as connection.js, apex.js, debugshell.js, and util.js in Visualforce pages in either of the following ways:

```
<apex:includeScript value="/soap/ajax/36.0/connection.js"/> or
loadScript("/soap/ajax/36.0/connection.js")
```

• **Images**—Hard-coded image URLs in Visualforce pages are not supported in Community Builder preview. We recommend that you upload images as static resources as follows:

```
<img alt="{{msg.severity}}" class="msgIcon" src="{!$Resource.spacerImage}"
title="{{msg.severity}}"/>
```

# 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.

# **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

### **USER PERMISSIONS**

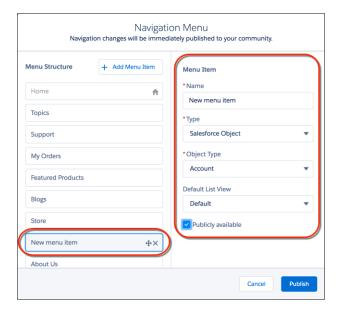
To create, customize, or publish a community:

"Create and 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 and Lightning Experience

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

### **USER PERMISSIONS**

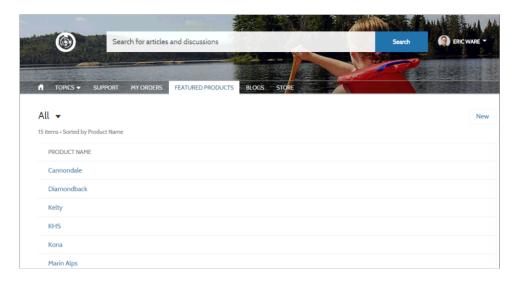
To create, customize, or publish a community:

"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:

Navigation Menu Record List

# Display Record Details in Your Community

Display record details using the generic Record Detail page or create custom record detail pages.



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

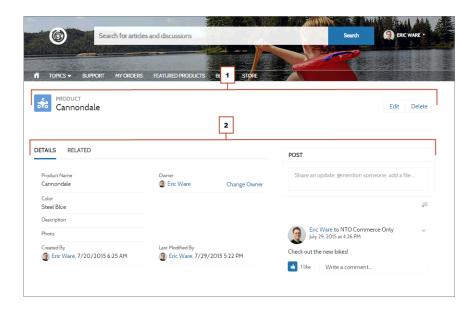
The Customer Service (Napili) template supports a record detail page that you can use out of the box with no configuration. All objects in your community without a preassigned record detail page use this generic page, called Record Detail, to display record data. For example, consider the scenario where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

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

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

### 1. Create a new Data Detail page in Community Builder and pick a supported object.

- **2.** Add the Record Headline and Record Information components to the page and configure the component properties in the property panel.
- 3. Publish your changes.
  - Note: If your community is active, your navigation menu item changes immediately appear to your community members.
- **Example:** The record detail page for a custom object with the Record Headline (1) and Record Information (2) components.



### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

### **USER PERMISSIONS**

To create, customize, or publish a community:

"Create and Manage Communities"

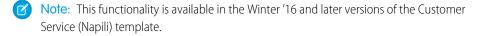
- Users accessing the community on a mobile device have access to actions from the record detail page. For example, a partner user with create and edit access to accounts can create accounts or update an account as needed.
- Some objects have preassigned record detail pages to display record data (such as cases). You can check the available pages and assignments for each object in Community Builder in Page Properties.
- Objects without preassigned record detail pages use the generic Record Detail page. If you modify the Record Detail page layout or configuration, be sure to account for all objects that use this page layout.
- Users without the necessary license, profile, and permissions can't access record data.
- Users with the necessary permissions can create records from the related lists, and edit and delete the record from the record headline. These actions aren't supported on mobile devices.
- Page layouts for each object in Salesforce determine what fields display in the Record Information component. The fields in the Highlight Panel layout determines what displays in the Record Headline component. This feature includes support for record types. You can modify the page layout, the Highlight Panel, and record type settings in Salesforce Setup.
- Enable feeds on records in Salesforce to allow users to post on them in communities.
- The Record Detail page, the Record Headline component, and Record Information component are not available in the Koa and Kokua templates.

#### SEE ALSO:

Record Banner
Record Information Tabs
Record Related List

# Add Groups to Your Community

Want more collaborative communities? Allow community members and guest users to browse and join groups in your Customer Service (Napili) community. Use the out-of-the-box design for groups or create your own customized version of the group detail page using separate components.



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**

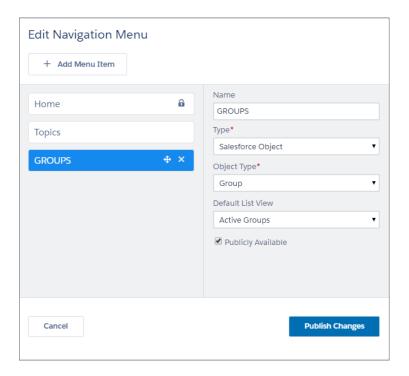
Available in: Salesforce Classic and Lightning Experience

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

# **USER PERMISSIONS**

To create, customize, or publish a community:

 "Create and Manage Communities"



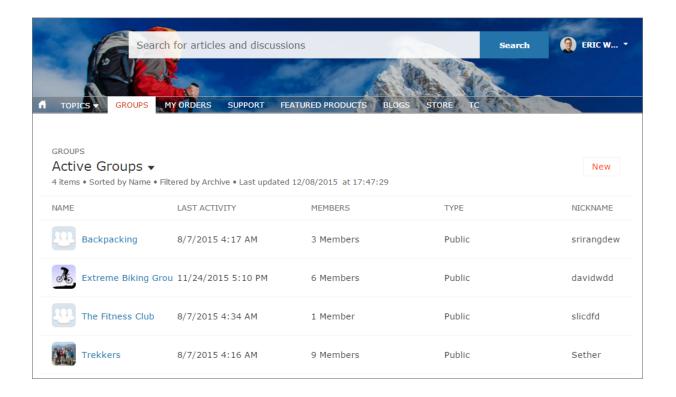
- 2. Publish your community.
- **3.** If you haven't already, customize the group publisher layout to include the Add Member action. This action allows group owners and managers to add members to the group, and isn't shown in the list of actions in the group by default.

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.

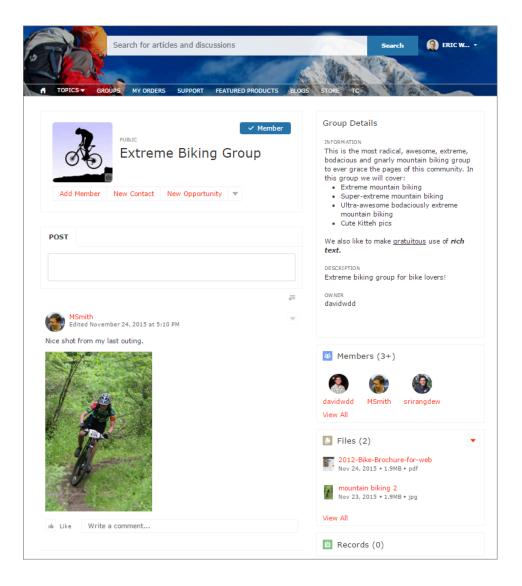
A few things to keep in mind:

- 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



# 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 and Lightning Experience

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



**Example**: Let's say you have a partner community for sales, and you store your product order information in a back-office ERP system. You can surface that information to your sales partners, enabling them to view and update orders within the context of all related data regardless of where it's stored.

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

#### SEE ALSO:

Salesforce Connect

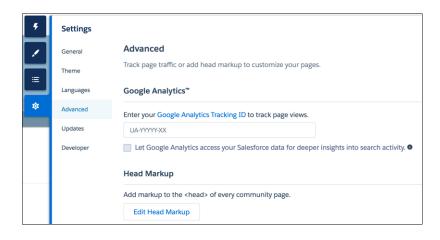
Identity Type for External Data Sources

# Track Community Users with Your Google Analytics Tracking ID

Add your Google Analytics<sup>™</sup> tracking ID to track page views in your community. Enable access to your Salesforce data for deeper insights. Then, adjust your community's pages to more accurately reach your customers.

To track using Google Analytics:

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





Available in: Salesforce Classic and Lightning Experience

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

### **USER PERMISSIONS**

To customize or publish a community:

"Create and Set Up Communities"

- **3.** To track user types, user IDs, and search activity, enable **Let Google Analytics access your Salesforce data for deeper insights** into search activity.
- **4.** To enable the service, publish the community.

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

Once you've set up Google Analytics to integrate with your Salesforce community's data, you can either create your own reports or you can install the preconfigured Google Analytics for Salesforce Communities package. For more information, see the Google Analytics for Salesforce Communities package write-up.

For developers of custom Lightning components for Communities, we provide the global

forceCommunity:analyticsInteraction event. Use this event to track events triggered by the custom component.

### IN THIS SECTION:

### Configure Google Analytics<sup>™</sup> for Salesforce Communities

Set up Google Analytics to track User IDs, community user types, and search activity so this information can be pulled into meaningful reports.

### SEE ALSO:

Lightning Components Developer Guide: forceCommunity:analyticsInteraction

# Configure Google Analytics<sup>™</sup> for Salesforce Communities

Set up Google Analytics to track User IDs, community user types, and search activity so this information can be pulled into meaningful reports.

Google Analytics integrates with your self-service community to track user types, user IDs, pageviews on Salesforce objects, and customer search activity. To correctly capture this information, some initial setup is required.

# First, let Google Analytics access your data to collect page views. Go to Settings > Advanced in Community Builder and enter your Google Analytics ID. For more information about the Google Analytics ID, check the Google Analytics documentation.

# **USER PERMISSIONS**

To customize or publish a community:

"Create and Set Up Communities"

- 2. Then select **Let Google Analytics access your Salesforce data for deeper insights into search activity** to allow Google Analytics to track user types, user IDs, and customer search activity within your community.
- **3.** Create custom dimensions in your Google Analytics account that capture user type and Salesforce object information. From your Google Analytics account, go to **Admin > Property > Custom Definitions > Custom Dimensions**. Click **+New Custom Dimension**. The first dimension you create in your Google Analytics account is automatically sorted as Index 1.
  - **a.** For Index 1, enter the Name: *User Type* and select **Hit** for the scope.
  - **b.** For Index 2, enter the Name *Salesforce Object* and select **Hit** for the scope.
- **4.** Create a User-ID view. With the User-ID view, you can analyze how specific segments of traffic with an assigned ID engage with your content. To create a User-ID view, go to **Admin** > **Property** > **Tracking Info** > **User-ID** and follow the instructions.
  - **a.** For the User-ID view, enter the Name: User Explorer.
- 5. To track how different types of users are interacting with the community, click **Reporting** > **Audience** > **User Explorer** > **User Flow**
- **6.** Once you've set up Google Analytics to integrate with your Salesforce community's data, you can either create your own reports or you can install preconfigured Google Analytics for Salesforce Communities package. Click here for more information about the Google Analytics for Salesforce Communities package.

# 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.



# **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

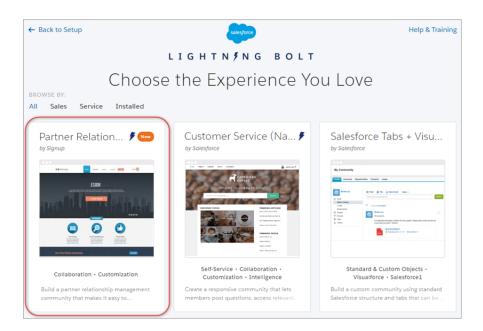
- **Example:** Let's say you specialize in building partner relationship management (PRM) communities for the manufacturing or tech industries. With Lightning Bolt, you can build and export a PRM-focused solution that's easy to distribute to your customers. After the template is installed on your customer's 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 an exported 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 solution 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.

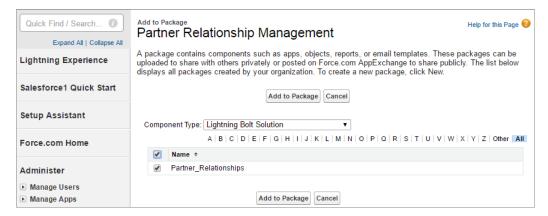
When you export a template, it appears in the Community Creation wizard in your org, where you can use it as a base for building new communities.



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 managed 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 customized template or page as a Lightning Bolt solution, keep the following considerations and limitations in mind.

### Export and Package Customized Lightning Bolt Solutions

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.

### Export and Package Customized Lightning Bolt 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 ISV force Guide: Creating and Uploading a Managed Package

# Export and Packaging Considerations for Lightning Bolt Solutions

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



**Note**: This functionality is only available in 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.

# EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

# 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

- For images in the Rich Content Editor, we export the version used in the editor, which is not necessary the latest version of the asset file
- Audience-based visibility criteria aren't included in the export process. Manually reenter this information after importing the page to the community in the destination org.
- When you export a page, its 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.
  - Custom theme layouts that aren't in use—only theme layouts that are selected in Settings > Theme are 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 audience-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:

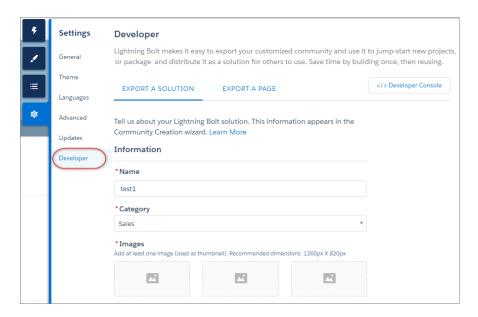
Export and Package Customized Lightning Bolt Solutions
Export and Package Customized Lightning Bolt Pages

ISV force Guide: Creating and Uploading a Managed Package

# Export and Package Customized Lightning Bolt Solutions

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.

- In Community Builder, click 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 solution.
- **2.** Add a unique name for the solution and select a category.



# **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

### **USER PERMISSIONS**

To customize or publish a community:

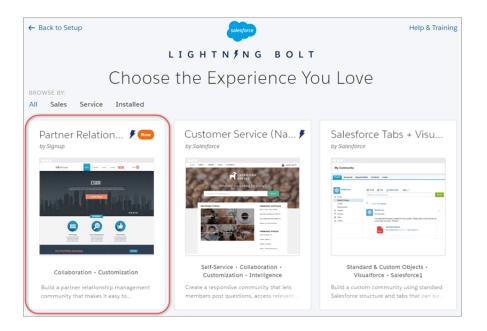
"Create and Set Up Communities"

- **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 solution.
- **4.** Enter a summary that describes the purpose of the solution.
- 5. Enter at least one key feature.

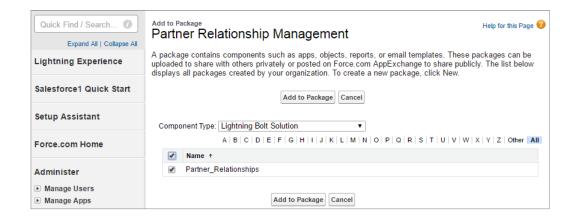
  The feature titles appear under the thumbnail in the Community Creation wizard, and the feature descriptions appear in the solution's detailed description.

### 6. Click Export.

After you export a solution, 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 solution and install it in another org, it appears in that org's Community Creation wizard.



- 7. If you want to package the exported solution:
  - a. From Setup, enter Package in the Quick Find box, and then click Packages.
    - Tip: We recommend using managed packages to avoid naming conflicts with other packages in your customer's org or your own.
  - **b.** Select **Lightning Bolt Solution** as the component type.



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



**Note**: To delete exported and imported solutions, from Setup, enter *Lightning Bolt Solutions* in the Quick Find box, and then click **Lightning Bolt Solutions**.

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

### SEE ALSO:

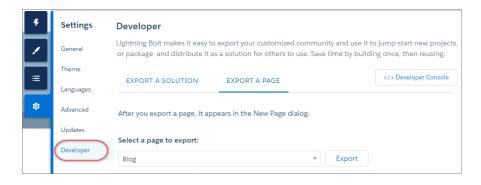
Export and Packaging Considerations for Lightning Bolt Solutions ISV force Guide: Creating and Uploading a Managed Package

# **Export and Package Customized Lightning Bolt 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.

To export a page and its components:

1. In Community Builder, click **Settings** > **Developer** and click **Export a Page**.

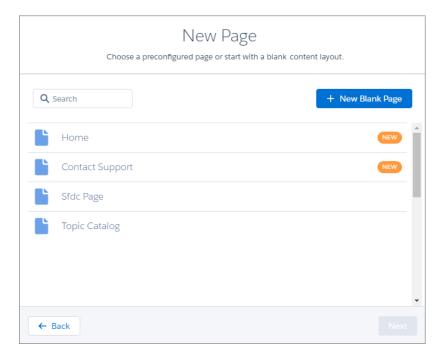




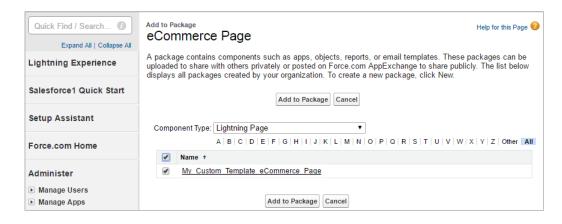
Communities"

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

After you export a page, it appears in the New Page dialog box in all the communities in your org. 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.
    - Tip: We recommend using managed packages to avoid naming conflicts with other packages in your customer's org or your own.
  - **b.** Select Lightning Page as the component type.



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



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

# **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 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 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. 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.

# **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

# 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 and Lightning Experience

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

Set up and monitor your community from Community Management or Community Workspaces.

#### What's a Community Manager?

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

### What's a Community Moderator?

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

### **Access Community Management**

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

# **Manage Your Community**

Set up and monitor your community from Community Management or Community Workspaces. You can customize your community at any time, but if you plan on making major changes, we

recommend deactivating the community first.

(1) Important: The options available in Community Management or Community Workspaces are based on your community template selection, permissions, and preferences. For example, if your community 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

Administration > Preferences and enable Show all settings in Community Management or Show all settings in Community Workspaces.

#### Home

- View your community's home page dashboard. If your home page still displays a message to install the Salesforce Communities Management package, your administrator hasn't mapped a dashboard yet.
- Preview the community or access your community's settings in the Community Builder, Force.com, or Site.com Studio from the Community Management menu in the global header or from Community Workspaces.

#### 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.

### **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

### **USER PERMISSIONS**

To access Community Workspaces or Community Management:

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

To access moderation rules and criteria:

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

To customize administration settings or use Community Builder:

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

#### 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.

### 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 and Community Workspaces initially return the items you most recently viewed from within the community. If an object you're looking for isn't in the Recently Viewed Documents list, try typing all or part of the object name and searching again.

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

### SEE ALSO:

What's a Community Manager? What's a Community Moderator?

# What's a Community Manager?

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

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

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

# EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

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

### IN THIS SECTION:

### Assign a Community Manager

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

# Assign a Community Manager

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

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

- 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 and Lightning Experience

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

# **USER PERMISSIONS**

To assign permission sets:

"Assign Permission Sets"

# What's a Community Moderator?

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

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

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

### A moderator can:

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

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

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

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



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

### IN THIS SECTION:

#### Which users can moderate?

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

### Assign a Community Moderator

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

### Which users can moderate?

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

Moderators can be users from your internal organization or external users, but only internal users can moderate from within Community Management and Community Workspaces. External users who are moderators can moderate within context of the community, such as directly in the community feed. Moderators can continue to flag items even if flagging is disabled for community members, although group owners and group managers can only moderate when flagging is enabled.

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

# **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

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

<sup>\*</sup>To allow group owners and managers to moderate, the Allow members to flag content option must be enabled.

# Assign a Community Moderator

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

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

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

# **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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 and Community Workspaces: Only internal users with the "Manage Communities" or "Create and Set Up Communities" permission can access the **Moderation** area.

# **Access Community Management**

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

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

If your community has Community Workspaces enabled, access that instead and navigate to the Moderation workspace.

- **2.** Choose the part of the community you want to manage:
  - Note: The options available in Community Management and Community Workspaces are based on your community template selection, permissions, and preferences. For example, if your community does not use topics, you don't see the Topics section. Some of To display all sections, go to Administration > Preferences and enable Show all settings in Community Management or Show all settings in Community Workspaces.
  - Preview the community or access your community's settings in the Community Builder, Force.com, or Site.com Studio from the Community Management menu in the global header or from Community Workspaces.
  - In Engagement, you can view Insights reports and take action on activity in your community.
  - In Dashboards, you can view community dashboards and reports.
  - In Moderation, you can set up moderation rules and monitor flagged feed items.
  - In Topics, you can manage navigational and featured topics.
  - In Recommendations, you can set up custom recommendations to appear in your community.
  - In Reputation, you can set up reputation levels and points.

# **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

# **USER PERMISSIONS**

To access Community Workspaces or Community Management:

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

To access moderation rules and criteria:

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

To customize administration settings or use Community Builder:

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

• 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.

# Measure Community Success with Dashboards

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

#### IN THIS SECTION:

#### Enable and Map Dashboards for Community Managers

Community managers can use dashboards in each community to measure its success. You can even map a dashboard to the Community Management or Community WorkspacesHome page. You can map custom dashboards or use the ones provided in our AppExchange package.

# **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

### Create a Dashboard for Your Community

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

#### View Community Dashboards.

Use dashboards to monitor the health of your community.

### What's the difference between 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 in each community to measure its success. You can even map a dashboard to the Community Management or Community WorkspacesHome page. You can map custom dashboards or use the ones provided in our AppExchange package.

You can choose to map any dashboard you have access to, but ensure that your community managers have access as well.

All dashboards in 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. Remember that although dashboards render in the Lightning view, Salesforce Communities isn't fully 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 pages has a default mapping to a dashboard from the package. You can overwrite these values as needed.

To map or update your dashboards:

- 1. Open Community Workspaces or Community Management.
- 2. Click 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.
  - The dashboard you map to Home displays on your Community Management or Community WorkspacesHome page.

#### 4. Click Save.

Dashboards are visible to community managers when they expand the Dashboards section or visit the Home page in Community Management or Community Workspaces.

Verify the dashboard mappings by clicking **Dashboards** and then clicking each page name. If you mapped a dashboard to the Home page, check that out too.

#### SEE ALSO:

Create a Dashboard for Your Community View Community Dashboards.

### **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

### **USER PERMISSIONS**

To map dashboards in Community Management or Community Workspaces:

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

**AND** 

"Manage Dashboards in Public Folders"

AND

# Create a Dashboard for Your Community

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



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

All dashboards in 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. Remember that although dashboards render in the Lightning view, Salesforce Communities isn't fully supported in Lightning Experience. Not all browsers support this Lightning view, so make sure you're using a supported browser.

Open Community Workspaces or Community Management.

1. Create custom report types based on the Networks object.

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



**Note:** You can create reports based on other objects and expose them in Community Management or Community Workspaces. 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 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.

### **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

### **USER PERMISSIONS**

To create custom report types:

"Manage Custom Report Types"

To create, edit, and delete reports:

 "Create and Customize Reports"

To create and share dashboards:

"Manage Dashboards in Public Folders"

- 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 and Community Workspaces, 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.** From Community Management or Community Workspaces, click **DashboardsSettings** to map your dashboard.

When a community manager accesses Community Management or Community Workspaces, the dashboard appears under Dashboards. If you mapped a dashboard to the Home page, the dashboard appears there.

Dashboards in Community Management and Community Workspaces are automatically refreshed every 24 hours. To see the latest data, click **Refresh**. If you access the dashboard after it has been recently refreshed, the dashboard displays the globally cached data from the last refresh. If the dashboard hasn't been refreshed in 24 hours, it's refreshed automatically when you access it. All role-based external users in your community can refresh dashboards set up with "Run as specified user" and "Run as logged-in user" up to 1,000 times daily per org. Scheduled and automatic refreshes don't count against the limit. There is no refresh limit for internal users.

Remember that you can customize your dashboards at any time. To edit your dashboard, go to the **Dashboards** > **Settings** page in Community Management or Community Workspaces. Click into the **Label** field to edit the page name and select the down arrow to the right of the **Dashboard** field to map to a different dashboard. Click **Edit dashboard** to open the dashboard in your internal Salesforce org. If you're using a dashboard that was created in Lightning Experience, the edit link won't work.

SEE ALSO:

Track Community Activity with Custom Reports

# View CommunityDashboards.

Use dashboards to monitor the health of your community.

All dashboards in 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. Remember that although dashboards render in the Lightning view, Salesforce Communities isn't fully supported in Lightning Experience. Not all browsers support this Lightning view, so make sure you're using a supported browser.

- 1. Open Community Workspaces or Community Management.
- 2. Click Dashboards.
  - Note: If the Dashboards section isn't displayed, your administrator hasn't mapped them for your community.

Pages that have dashboards mapped to them appear in the Dashboards section or on the Home page.

**3.** Click the dashboard page you want to view.

The dashboard appears. For an immediate refresh of dashboard data, click **Refresh**.

Dashboards in Community Management and Community Workspaces are automatically refreshed every 24 hours. To see the latest data, click Refresh. If you access the dashboard after it has been recently refreshed, the dashboard displays the globally cached data from the last refresh. If the dashboard hasn't been refreshed in 24 hours, it's refreshed automatically when you access it. All role-based external users in your community can refresh dashboards set up with "Run as specified user" and "Run as logged-in user" up to 1,000 times daily per org. Scheduled and automatic refreshes don't count against the limit. There is no refresh limit for internal users.

**4.** To view a related report, click **View Report** on the dashboard.

Remember that the dashboards are configured to display community-specific data.

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

Remember that you can customize your dashboard at any time. To edit your dashboard, go to the **Dashboards > Settings** page in Community Management or Community Workspaces. Click into the **Label** field to edit the page name and select the down arrow to the right of the **Dashboard** field to map to a different dashboard. Click **Edit dashboard** to open the dashboard in your internal Salesforce org. If you're using a dashboard that was created in Lightning Experience, the edit link 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.

community.

Use Engagement to view, monitor, and act on your community's Use Dashboards to view your community's metrics, such as trends activity. Insights give you a detailed look at a specific area of your on activity. Dashboards give you mid-term to long-term views on adoption and engagement in your community. They help you

# **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

# **USER PERMISSIONS**

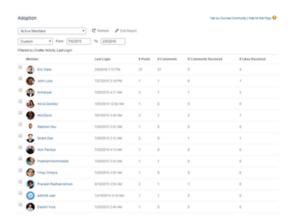
To view dashboards:

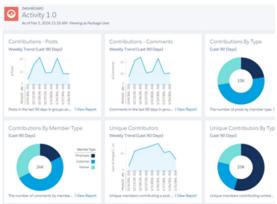
"Manage Communities"

"Create and Set Up Communities"

AND

monitor return on investment (ROI) and key performance indicators (KPI).





For example, you can visit the **Engagement > Adoption** page to For example, you can visit the **Dashboards > Activity** page to view a report about new members in your community that have track total posts and comments including overall contribution 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.

#### SEE ALSO:

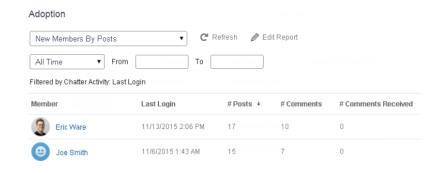
View and Customize Insights for Your Community View Community Dashboards.

# Insights for Community Engagement

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



**Example:** With an Insights report set up to track new members, community managers can quickly navigate to a new member's profile to send them a welcome message.



# **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

Sridhar Nelloru

Adoption New Members New Members Recent Contributors Date Last Login Last Chatter Activity Recent Logins Top Active Members By Comments 7/27/2015 3:10 PM Top Active Members By Influence Top Active Members By Likes Received 7/20/2015 4:13 AM Top Active Members By Posts Top Contributors Inactive For 7+ Days 7/20/2015 4:12 AM Top Influencers Inactive For 7+ Days Top New Members By Comments Top New Members By Comments Received Top New Members By Influence Top New Members By Likes Received 7/20/2015 4:11 AM Top New Members By Posts
Top New Members By Total Contributions 7/20/2015 4:01 AM Jeffrey Freschl 7/20/2015 3:59 AM

7/20/2015 3:57 AM

7/20/2015

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 Your Own Insights for Your Community

Create your own Insights to display in Community Management or Community Workspaces. We recommend that you create your Insights reports based on custom report types available for communities.

### Create Custom Actions for Community Insights

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

### View and Customize Insights for Your Community

Use Insights in 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 or Community Workspaces. 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.

To map or update Insights for your community:

1. Open Community Workspaces or 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 map up to 10 Insights pages.

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 in Community Management or Community Workspaces.

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 or Community Workspaces. 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 and Lightning Experience

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

### **USER PERMISSIONS**

To map Insights in Community Management or Community Workspaces:

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

AND

"Manage Reports in Public Folders"

AND

# Create Your Own Insights for Your Community

Create your own Insights to display in Community Management or Community Workspaces. We recommend that you create your Insights reports based on custom report types available for communities.



Tip: Get out-of-the-box Insights in the Salesforce Communities Management package available for download from the AppExchange. To use the preconfigured Insights reports, your community must use Chatter.

1. Create custom report types based on the Networks object.

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

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

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

# **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

### **USER PERMISSIONS**

To create custom report types:

"Manage Custom Report Types"

To create, edit, and delete reports:

 "Create and Customize Reports"

To create and share report folders:

 "Manage Reports in Public Folders" 3. Save the report to a new report folder that you can map to in Community Management or Community Workspaces.

We recommend that you create a separate report folder for each of your Insights pages. For example, create one report folder called *Insights Members* and another called *Insights Moderation*.

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 or Community Workspaces.

- **4.** Share your Insights report folder with your community managers.
- 5. In Community Management or Community Workspaces, click **Engagement** > **Settings** to map Insights pages to your report folder.

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



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

SEE ALSO:

Track Community Activity with Custom Reports Create Custom Actions for Community Insights

# Create Custom Actions for Community Insights

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

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

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

**1.** Create a Visualforce page.

There are a few options you can use:

Use a standard controller

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

Use a standard list controller

Choose this option to create a Visualforce page that can display or act on a set of records. Examples of existing Salesforce pages that work with a set of records include: list pages, related lists, and mass action pages.

Use a controller extension that uses Apex

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.

# **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

## **USER PERMISSIONS**

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

"Customize Application"

To edit custom Visualforce controllers:

"Author Apex"

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

2. Add your custom action to the Insights report.

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

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

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

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

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

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

```
retPage.getParameters().put(failure, String.valueOf(failureCount));
        return retPage;
   }
   private void deleteFeedPosts() {
        List<FeedItem> feedItems = [Select Id, CreatedById FROM FeedItem WHERE
CreatedById IN :ids];
        deleteResult = Database.delete(feedItems, false);
        //Update the resultMap with failures to calculate the failureCount
        if(deleteResult != null) {
            for(Integer i=0;i < deleteResult.size();i++) {</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.



- 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 for Your Community

Use Insights in 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 Workspaces or 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 and Lightning Experience

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

## **USER PERMISSIONS**

To view Insights in Community Workspaces or Community Management:

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

AND

Is a member of the community

To customize Insights reports:

 "Create and Customize Reports"

- Take action! Only the first two actions are displayed on the page. To see more actions, click next to the displayed actions. You can select up to 100 rows at a time.
- To filter the report by relative and custom date ranges, use the 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 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 for your community are automatically refreshed when you access them. You can also force an update.

SEE ALSO:

Create Custom Actions for Community Insights
What's the difference between 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

# EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

• 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 AppExchange Packages for Community Management.



Note: Changes to a feed item's status are not included in the Audit Trail Insightsreport.

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

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

#### IN THIS SECTION:

#### Track Community Activity with the Moderation Overview Page

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

#### Enable Members to Flag Items in Your Community

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

#### Community Moderation Criteria

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

#### **Community Moderation Rules**

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

#### Review and Approve Posts and Comments in Your Community

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

#### Moderate Flagged Posts and Comments in Your Community

Community moderators can review a list of posts and comments that members of the community have flagged as inappropriate and 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 Direct Messages in Your Community

Community members can flag messages in communities built using the Customer Service (Napili) template. Community moderators can review and act on a list of direct messages that members of the community have flagged as inappropriate or spam.

#### Moderate Flagged Private Messages in Your Community

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

#### Set Up Apex Triggers for Flagging Items

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

#### **Communities Moderation Limits**

Community moderation limits ensure that your community performs optimally.

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

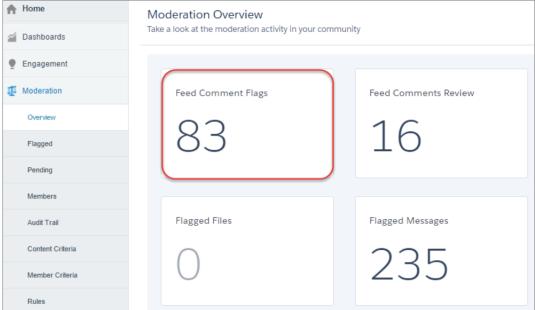


**Example:** To view all feed comment flags, click **Feed Comment Flags** and go directly to the Feed Comments Flags Insight report. You can approve or delete flagged comments in bulk, directly from the Insight report.

# **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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



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 Workspaces or Community Management.
- 2. Click Administration > Preferences, then select Allow members to flag content.
- 3. Click Save.

With this setting enabled in a community:

- Members can flag posts, comments, and files using the Flag as inappropriate option.
- Members can flag messages from within the community on their My Messages page in Chatter.
  If a member has turned on email notification for messages, they can also flag the message
  directly from their email. Members can only flag messages that are sent from communities they
  are members of.
  - Note: Messages can't be flagged in partner or customer portals, your internal organization, or from Salesforce1.
- Group owners and managers can moderate groups they own or manage.

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

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

# **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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 Badword, it's matched when
  a user types BADWORD or badword.

Set up content criteria to use in your moderation rules:

- **1.** Open Community Workspaces or Community Management.
- If you're using Community Workspaces, access Moderation by clicking Moderation > Content Criteria > New. If you're using Community Management, access Moderation by clicking ModerationContent Criteria.
- 3. Enter a name, unique name, and description for your criteria.
- 4. Click Save.
- **5.** Update the keywords in your criteria.

To add keywords, click **Add**.

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

# **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

# USER PERMISSIONS

To view, create, edit, and delete criteria:

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

**AND** 

b@dword

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

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

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

### **5.** Select to filter your members by:

- None—Select this option if you don't want to filter the criteria using the other options. None is the default selection.
- User creation date—Select this option to include only users that were created within a specific time frame. Enter the number of days since the user was created.



**Note:** A user's creation date might not be the same date they became a member of the community. For example, you can have an internal user that was created 120 days ago who became a member of the community 5 days ago. For users that self-register, their creation date is the date they become a member of the community.

Members without community contributions—Select this option to include only members that haven't posted
or commented in the community. Posts that are pending review don't count as community contributions until they are approved.

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 and Lightning Experience

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

### **USER PERMISSIONS**

To view, create, edit, and delete criteria:

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

AND



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:

### Customize Preconfigured Moderation Rules

If your community was created after Spring '17, your community comes populated with preconfigured moderation rules that block, flag, freeze, replace or review banned keywords. Simply activate the rules and they are ready to go. You can customize both the rules and the list of banned keywords.

# **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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.

#### Create Rate Limit Rules to Moderate Your Community

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

#### How and when do community moderation rules execute?

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

#### **Enable Record Feed Moderation**

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

# **Customize Preconfigured Moderation Rules**

If your community was created after Spring '17, your community comes populated with preconfigured moderation rules that block, flag, freeze, replace or review banned keywords. Simply activate the rules and they are ready to go. You can customize both the rules and the list of banned keywords.

- Your org can have up to 30 rules. This limit is per org, not per community. This limit includes both content rules and rate rules.
- Each content rule can have up to 3 keyword criteria and 10 member criteria.
- Rules that block content run first, followed by rules to review and approve content, then rules
  that replace content, and last the rules that flag content. If two or more rules perform the same
  action, the oldest rule runs first, based on the date the rule was created. Rules to replace content
  don't run when the content also applies to a review rule—we want community managers to
  review the original content.
- Moderation rules apply only to feed posts, comments, and polls. Moderation rules do not apply to topics that are created.
- 1. Open Community Workspaces or Community Management..
- 2. Click **Moderation** > **Rules** > **Moderation Rule**, then click **Edit** next to the rule that you want to modify.
- **3.** If the rule meets your requirements, simply click **Activate**. Or you can customize the following fields:
  - **Name**—Change the name of your rule.
  - **Unique Name**—Enter a unique name for your rule. The unique name used by the API.
  - **Description**—Optionally, change the description.
  - Activate Rule—Select to activate rule.
  - **Applies To**—Specify which types of member-generated content this rule applies to. Posts and comments only apply to content created in groups and user profiles. All feed types, such as polls and links, are supported.
  - Moderation Action—Change what you want to happen when the criteria is matched.
    - **Block** prevents the content from being published.
    - Review allows users with the "Can Approve Feed Post and Comment" permission to approve the content before it's published.
    - Replace publishes the content with the keywords replaced as asterisks. For example, BadWord becomes \*\*\*\*\*\*.
    - Flag publishes the content and then automatically flags the content as inappropriate.
  - **Message for Member**—Change the existing pop-up message that your member sees when their content is blocked. If you don't specify a message, the member sees the standard message: "You can't use <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.
  - Member Criteria

    —Specify member criteria to enforce this rule. Ask yourself, who should this rule apply to?
  - **Content Criteria**—Specify the content criteria to enforce this rule. Ask yourself, what specific keywords should this rule apply to? A list of banned keywords has been created for you and is preselected for the rule. You can add or remove terms from the list by clicking **Content Criteria** and clicking **Banned Keywords**.

# **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

### **USER PERMISSIONS**

To view, create, edit, and delete rules:

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

AND

#### 4. Click Save.

A few things to bear in mind:

- If you activate a content rule without specifying member criteria, the rule applies to all members.
- If you activate a content rule without specifying content criteria, the rule either:
  - Prevents members from creating posts and comments entirely
  - Sends all posts for review
  - Flags all posts and comments
- If you select member criteria and content criteria, the rule applies only when both criteria are met.
- Specifying criteria is optional. However, we recommend that you include criteria in your rules to target specific members and content.

# Create Content Rules to Moderate Your Community

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

If your community uses the Customer Service (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.
- Pip: Before creating a rule, we recommend that you create criteria to use in the rule.
- 1. Open Community Workspaces or Community Management.
- 2. Click ModerationRules, then click New and select Content Rule.
- **3.** Complete the following fields:
  - Name—Enter a name for your rule.
  - 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.

# **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

# **USER PERMISSIONS**

To view, create, edit, and delete rules:

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

AND

- 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 <code>Translate</code> in the Quick Find box, then select **Translate**. To provide a translation for the message, select the Moderation Rule setup component and expand the community the rule belongs to.
- Member Criteria—Specify member criteria to enforce this rule. Ask yourself, who should this rule apply to?
- Content Criteria—Specify the content criteria to enforce this rule. Ask yourself, what specific keywords should this rule apply to?
- (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 Workspaces or Community Management.
- 2. Click ModerationModerationRules, then click New and select Rate Rule.
- **3.** Complete the following fields:
  - Name—Enter a name for your rule.
  - Unique Name—Enter a unique name for your rule. The unique name used by the API.
  - Description—Optionally, enter a description.
  - Activate Rule—If selected, the rule is activated.
  - Applies To—Specify which types of member-generated content this rule applies to. Posts and comments only apply to content created in groups and user profiles.
  - Member Criteria—Specify the member criteria to enforce this rule. Ask yourself, who do I want this rule to apply to?
     Spammers are typically new members. We recommend creating member criteria that only includes customer users that were created in the last 7 days.

#### Note:

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

# **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

### **USER PERMISSIONS**

To view, create, edit, and delete rules:

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

AND



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.

# **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

### **USER PERMISSIONS**

To view, create, edit, and delete rules:

 "Create and Set Up Communities"

AND

Example: Enable Record Feed Moderation from Communities



# Review and Approve Posts and Comments in Your Community

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

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

### **Self-Service Community**

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

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

#### **Partner Community**

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

#### **Employee Community**

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



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

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

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

 Use a preconfigured Insights report in Community Workspaces or Community Management.

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

### **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

### **USER PERMISSIONS**

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



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

"Can Approve Feed Post and Comment"

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

 "Can Approve Feed Post and Comment"

**AND** 

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

**AND** 

Is a member of the community 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 AppExchange Packages for Community Management.

Approve posts and comments directly in the community feed.

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

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

SEE ALSO:

Create Content Rules to Moderate Your Community

# 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 Workspaces or 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 AppExchange Packages for Community Management.

• 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 and Lightning Experience

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

### **USER PERMISSIONS**

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

 "Moderate Communities Feeds"

To moderate posts and comments in Community Workspaces or Community Management:

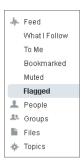
 "Access Community Management" OR"Moderate Communities Feeds"

AND

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

AND

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



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

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

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

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

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

#### SEE ALSO:

Chatter REST API Developer Guide Apex Developer Guide

# **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

### **USER PERMISSIONS**

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

 "Moderate Communities Files"

To moderate files in Community Management:

 "Moderate Communities Files"

AND

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

AND

# Moderate Flagged Direct Messages in Your Community

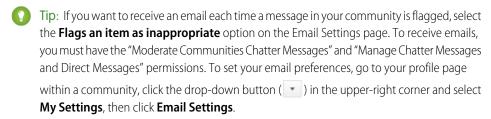
Community members can flag messages in communities built using the Customer Service (Napili) template. Community moderators can review and act on a list of direct messages that members of the community have flagged as inappropriate or spam.



**Note:** Private messages and direct messages are separate features. Direct messages are newer and offer a richer feature set for private communication in communities. Direct messages are based on Chatter and offer a rich text editor that supports inline images and attachments. With direct messages, you can start a message right from a feed post.

The "Moderate Communities Chatter Messages" permission allows moderators to see the contents of flagged direct messages, remove flags, and delete flagged messages.

- 1. If you haven't already, install the Salesforce Communities Management (for Communities with Chatter) package from the AppExchange.
- 2. Open Community Workspaces or Community Management.
- **3.** In Community Management, go to **Moderation** > **Flagged** and select **Direct Messages** from the dropdown menu to filter the flagged items.
- 4. Review and act on the flagged messages.



### **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

### **USER PERMISSIONS**

To view and moderate flagged direct messages in Community Management or Community Workspaces:

 "Moderate Communities Chatter Messages"

AND

"Manage Chatter Messages and Direct Messages"

AND

"Moderate Communities Feeds"

AND

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

AND

Is a member of the community

To make all posts available to moderation, including direct messages, in Communities Settings under Community Moderation Rule Settings:

 Moderation applies to all feed posts regardless of where they are visible

# Moderate Flagged Private Messages in Your Community

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

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

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

- Important: Keep these limitations in mind:
  - Community members can't flag messages sent from communities that they aren't a member of or that haven't turned on flagging for their users.
  - Users can't flag messages in your internal organization, in 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 or Community Workspaces.
   Use the Flagged Private Messages report provided in the Salesforce Communities Management package. This report lets you track trends and stay on top of message spamming attacks in your community. You can view who sent the message, the contents of the message, when it was sent, and who flagged the message. You can use this report to unflag messages and delete messages.

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

Create your own report.

First, create a custom report type using Networks as the primary object and Network Audits as the secondary object. Then create a report using your new custom report type and add a field filter for Audited Object Type set to equal Chatter Message. Use the API to delete flagged messages.

• Directly query the flagged messages from the API and then delete them.

Tip: If you want to receive an email each time a message in your community is flagged, select the **Flags an item as inappropriate** option on the Email Settings page. To receive emails, you must have the "Moderate Communities Chatter Messages" and "Moderate

### **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

### **USER PERMISSIONS**

To moderate messages in Community Management or Community Workspaces:

"Moderate Communities Chatter Messages"

AND

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

AND

Is a member of the community

To view the contents of a flagged message in reports:

"Moderate Communities Chatter Messages"

To remove flags or delete messages in the SOAP API:

"Modify All Data"

Communities Feeds" permissions. To set your email preferences, go to your profile page within a community, click the drop-down button ( ) in the upper-right corner and select **My Settings**, then click **Email Settings**.

SEE ALSO:

Report on Communities with the AppExchange Packages for Community Management SOAP API Developer Guide: ChatterMessage

Apex Developer Guide: Moderate Chatter Private Messages with Triggers

# Set Up Apex Triggers for Flagging Items

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



Tip: Did you know you can do this in the UI? Most communities don't need custom moderation triggers. You can create moderation rules and criteria directly in Community Workspaces or Community Management. For more information, see Community Moderation Rules.

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

Consider the following when creating triggers:

- Create Apex after insert triggers on either 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*.

```
trigger autoflagBadWordOnPost on FeedItem (after insert) {
   List<NetworkModeration> flags = new List<NetworkModeration>();
   for (FeedItem rec : trigger.new) {
       if (!<CommunityId>.equals(rec.networkScope)) {
            continue;
        if (rec.body.indexOf('BadWord') >= 0) {
           NetworkModeration nm = new NetworkModeration(EntityId = rec.id, Visibility
= 'ModeratorsOnly');
           flags.add(nm);
        }
   }
   if (!flags.isEmpty()) {
       insert(flags);
```

# **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

# **USER PERMISSIONS**

To create triggers:

"Modify All Data"

A similar trigger on comments would look like this.

```
trigger autoflagBadWordOnComment on FeedComment (after insert) {
   List<NetworkModeration> flags = new List<NetworkModeration>();

for (FeedComment rec : trigger.new) {
   if (!<CommunityId>.equals(rec.networkScope)) {
      continue;
   }

   if (rec.commentBody.indexOf('BadWord') >= 0) {
      NetworkModeration nm = new NetworkModeration(EntityId = rec.id, Visibility = 'ModeratorsOnly');
      flags.add(nm);
   }
}

if (!flags.isEmpty()) {
   insert(flags);
}
```

SEE ALSO:

SOAP API Developer Guide

### **Communities Moderation Limits**

Community moderation limits ensure that your community performs optimally.

#### Criteria Limits

- Your org can have up to 30 keyword list criteria. This limit is per org, not per community.
- Your org can have up to 100 member criteria. This limit is per org, not per community.

### **Rule Limits**

- Your org can have up to 30 rules. This limit is per org, not per community. This limit includes both content rules and rate rules.
- Moderation rules apply only to feed posts, comments, and polls. Moderation rules do not apply to topics that are created.

#### **Audit Limits**

Changes to a feed item's status are not included in the Audit Trail Insightsreport.

# Organize Communities with Topics

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

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

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



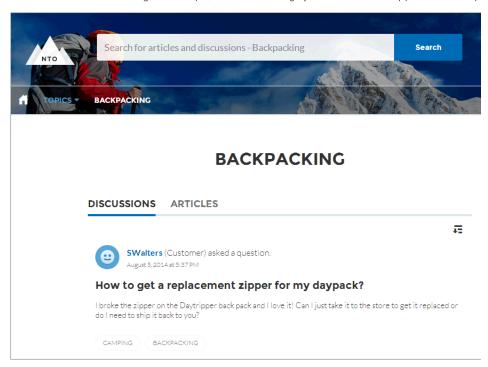
Tip: To add navigational and featured topics to other types of communities, Apex developers can use the ConnectApi.ManagedTopics class in a Visualforce page.

# **Navigational Topics**

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

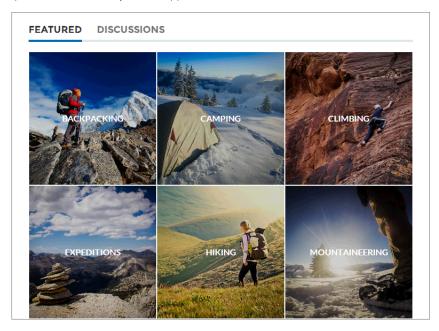


When visitors choose a navigational topic, the banner image you selected for it appears at the top of the page.



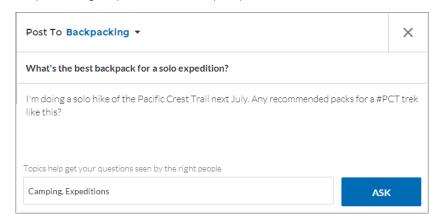
# **Featured Topics**

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



# **Member-Created Topics**

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



If any suggested topics are poor matches for the post, members can simply click to delete them.



Tip: Member-created topics can be accessed via search, or highlighted as featured topics.

### **Topic Metrics**

Community members can check how often a topic has been used in the past 60 days and how many followers it has. Find metrics on a topic's detail page. With this information at their fingertips, community members know how current and popular a topic is. Admins can also use these metrics to highlight certain topics in their communities or consolidate similar topics based on usage.

#### IN THIS SECTION:

#### Manage Topics in Communities

As the number of topics in a community grows, curate them to improve usability. Whether you've enabled Community Workspaces or are working 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 Community Workspaces or Community Management page:	"Manage Communities"  OR  "Create and Set Up Communities"	Available in: Salesforce Classic and Lightning Experience
To create topics:	"Create Topics"	Available in: <b>Enterprise</b> , <b>Performance</b> , <b>Unlimited</b> ,
To merge topics:	"Merge Topics"	and <b>Developer</b> Editions
To delete topics:	"Delete Topics"	
To rename topics:	"Edit Topics"	

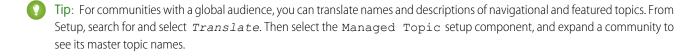
As the number of topics in a community grows, curate them to improve usability. Whether you've enabled Community Workspaces or are working in Community Management, you can create, merge, rename, and delete topics in one convenient location.

1. Open Community Workspaces or Community Management.

- 2. If you're using Community Workspaces, access Topics by clicking Content Targeting > Topics > Topic Management. If you're using Community Management, access Topics by clicking Topics > Topic Management.
- **3.** Do one of the following:
  - To create a topic (often with a plan to merge existing ones into it), click **New**. Add a name and a topic description, which will boost SEO.
  - To combine existing topics, click **Merge**.

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

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



#### 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 Workspaces or Community Management.
- If you're using Community Workspaces, access Topics by clicking Content Targeting > Topics >
   Featured Topics. If you're using Community Management, access Topics by clicking Topics >
   Featured Topics.
- **3.** Enter the first few letters of the topic name in the search box. Select a suggested topic and click **Add**. Use navigational or member-created topics.
  - ? Tip: Using the Chatter REST API, you can create unique featured topics, separate from navigational or member-created ones.
- **4.** Hover over a topic name, and click **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 and Lightning Experience

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

### **USER PERMISSIONS**

To access Community Workspaces or Community Management page:

"Manage Communities" OR

> "Create and Set Up Communities"

AND

Is a member of the community

To set up featured topics:

"Edit Topics"

# Set Up Navigational Topics

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

- 1. From Setup, enter *Topics for Objects* in the Quick Find box, then select **Topics for Objects**, and enable topics for all the article types you want to include.
  - Note: Enabling topics disables public tags on articles. Personal tags aren't affected.
- **2.** Open Community Workspaces or Community Management.
- 3. If you're using Community Workspaces, access Topics by clicking Content Targeting > Topics > Navigational Topics. If you're using Community Management, access Topics by clicking Topics > Navigational Topics
- **4.** In the text box at right, enter a topic name, and click **Add**. Want to add subtopics? After you add a topic, choose your topic from the drop down menu (under Show the subtopics of). To add a subtopic, add another topic and click **Add**. You can add up to two levels of subtopics for each parent topic.
- - (1) Important: This process adds only current articles to a topic. To add new articles, return to Community Management or Community Workspaces and repeat the step above.
- **6.** Hover over a topic name, and click **1**. Then click **Upload banner image** and select an image that appears across the top of the topic page.

(Banner images are scaled to  $1400 \times 180$  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.

### **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

### **USER PERMISSIONS**

To access Community Workspaces or Community Management page:

"Manage Communities"
 OR

"Create and Set Up Communities"

AND

Is a member of the community

To set up navigational topics:

"Create Topics"

AND

"Edit Topics"

To add articles to topics:

"View Data Categories"

AND

"Read" on related article types

Level	Maximum Number of Entries
One (parent)	25
Two (subtopic)	10
Three (subtopic)	10

- 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.

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.

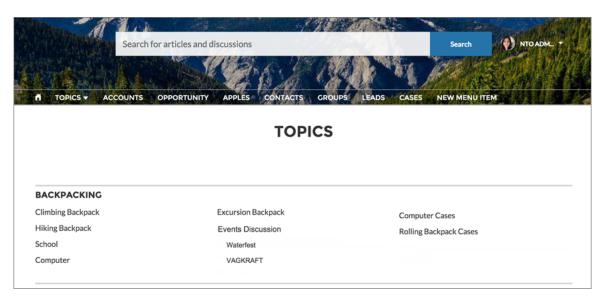
How is the topic catalog useful to your community members?

- 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 Workspaces or Community Management.
- 2. If you're using Community Workspaces, access Topics by clicking Content Targeting > TopicsArticle Management. If you're using Community Management, access Topics by clicking TopicsArticle 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 and Lightning Experience

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

#### **USER PERMISSIONS**

To access Community
Workspaces or Community
Management page:

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

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 Workspaces or Community Management only changes the English community. All translated topic name and description changes must be made using the Translation Workbench.

# EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

### **USER PERMISSIONS**

To translate topics:

 "View Setup and Configuration"

AND

Be designated as a translator

- If a translated topic name is entered when the community is in English mode, the translated name can appear twice in the translated community.
- When topics names are translated with the Translation Workbench, hashtags in the translated communities also change. For example, #help shows as #aiuto in Italian. If the community member then reverts to English from Italian, clicking the #aiuto hashtag gives an error message rather than showing the topic detail page of #help.
- Note: To automatically add the translated version of a topic to translated articles, the translated topics and articles must already be uploaded in the system. Otherwise, the translated article is tagged with the English topic.

# **Customize Recommendations in Communities**

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

- 1. Open Community Workspaces or Community Management.
- 2. Open Recommendations.
  - In Community Workspaces, select Content Targeting > Recommendations.
  - In Community Management, select Recommendations > Recommendations.
- 3. Select **Default Channel** or one of the custom channels.

A channel is a way to group recommendations together so you can determine where they show up in the community.

#### **Default Channel**

Recommendations in the default channel appear in predefined locations, such as 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. 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.

### **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

### **USER PERMISSIONS**

To access Community Workspaces or Community Management:

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

The URL can contain context variables to pass information about the user who clicked the recommendation and the context in which it was clicked. For example, include a {!userId} context variable in your URL,

https://www.example.com/doSurvey?userId={!userId}. When a user clicks the button in the recommendation, Salesforce sends the ID of that user to your server in the HTTP request.

Recommendations support these context variables.

Context Variable	Description
{!actionLinkId}	The ID of the recommendation link that the user clicked.
{!actionLinkGroupId}	The ID of the recommendation link group containing the recommendation that the user clicked.
{!communityId}	The ID of the community in which the user clicked the recommendation. The value for your internal Salesforce org is the empty key, "000000000000000000".
{!orgId}	The ID of the org in which the user clicked the recommendation.
{!userId}	The ID of the user that clicked the recommendation.

- Audience—Select an audience for the recommendation. If you don't select an audience, all members of the community see the recommendation.
  - Tip: To create an audience that appears in this drop-down list, in Community Workspaces, select **Content Targeting** > **Recommendations** > **Audiences**. In Community Management, select **Recommendations** > **Audiences**. 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.

1 Tip: To remove a recommendation, click the recommendation name. At the bottom of the recommendation details, click **Delete**.

#### IN THIS SECTION:

#### Create Targeted Audiences for Your Community Recommendations

Create audiences of new community members or use the API to manage customized lists of audience members to organize and target recommendations.

#### SEE ALSO:

Update Your Community's Template

## Create Targeted Audiences for Your Community Recommendations

Create audiences of new community members or use the API to manage customized lists of audience members to organize and target recommendations.

- **1.** Open Community Workspaces or Community Management.
- 2. Open Audiences.
  - In Community Workspaces, select Content Targeting > Recommendations > Audiences.
  - In Community Management, select Recommendations > Audiences.
- 3. Click New.
- **4.** Complete the following fields.
  - Name—Enter a name for the audience in Community Management or Community Workspaces.
  - Audience Type
    - Select New Members to create an audience based on how long users have been community members.

Enter the number of days since registration for audience members.

- Select Custom List to create an audience based on any criteria you want.
  - Note: You can't manage audience membership for custom lists through the UI. Add and remove members through the API.

### **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

### **USER PERMISSIONS**

To access Community
Workspaces or Community
Management:

- "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, 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:

# EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

- Posting
- Commenting
- Liking a post or comment
- Sharing a post
- People sharing your posts
- People commenting on your posts
- People liking your posts or comments
- Mentioning someone
- Being mentioned
- Asking a question
- Answering a question
- Receiving an answer
- Marking an answer as best
- People marking your answer as best
- Endorsing someone for knowledge on a topic
- Being endorsed for knowledge on a topic

Your administrator defines the activities that help you gain points. They also set the number of points for each action.

#### IN THIS SECTION:

#### **Enable Reputation in Your Community**

Enable reputation in your community so that members are recognized and rewarded for participating.

#### Set Up Reputation Levels

Update the default reputation levels to meet your community's needs and help motivate your members.

#### Set Up Reputation Points

Set up a point system to reward users for participating in the community.

#### How is my community reputation calculated?

The reputation level on your profile is calculated based on your total points.

# **Enable Reputation in Your Community**

Enable reputation in your community so that members are recognized and rewarded for participating.

A powerful tool for a community manager is the ability to recognize individual members for their participation. Community managers know that recognition and a little friendly competition usually lead to more active members. Enabling reputation turns on a default point system and set of reputation levels in the community. A community manager can personalize labels and point values from the Community Management page.

Members start to accrue points by performing the actions that have assigned point values. Once the member exceeds the top of the level's point threshold, they move up a level. They, and other members of the community, see their reputation level on their profile and when hovering over their name. Total points also show on member's profiles.



**Note**: When you enable Reputation, Chatter influence is removed from the Contribution section on the profile page.

- 1. Open Community Workspaces or Community Management.
- 2. Click 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:

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	

#### **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

#### **USER PERMISSIONS**

To edit Communities settings:

"Create and Set Up Communities"

**AND** 

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

Action	Points
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 Workspaces or Community Management.
- If you're using Community Workspaces, access Reputation by clicking Administration >
   Reputation Levels. If you're using Community Management, access Reputation by clicking
   Reputation > Reputation Levels.

From here you can:

• Upload your own image for each reputation level. Click the default image to browse to an image file and upload a new image.



**Note:** You can't revert to the default reputation level images from the Salesforce user interface. Use the Salesforce Chatter REST API to do this.

- Give each level a name, such as "Beginner," "Intermediate," and "Expert." If you don't assign a name, the default is used. For example, "Level 1," "Level 2," "Level 3."
- Edit the point range for a level.

When you update the higher value of a level's point range, the lower value for the next level is automatically adjusted when you save.

- Add more levels by clicking Add a level, located underneath the list of levels.
- Remove a level by clicking a next to the level.

### **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

### **USER PERMISSIONS**

To update reputation levels:

"Manage Communities"
 AND

Is a member of the community

#### 3. Click **Save** to apply your changes.

You can now update the point system for the community. The point system determines how many points a user gets when they perform certain actions or when others recognize their contributions by commenting, liking, or sharing their posts. Reputation level increases are posted to member feeds.

You can translate reputation level names so that international community members can view their reputation levels in the appropriate language. In Translation Workbench, select the Reputation Level setup component and then expand the node next to your community.

SEE ALSO:

Set Up Reputation Points

# **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

### **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

### **USER PERMISSIONS**

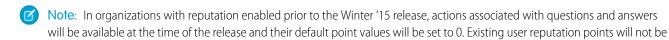
To update reputation points:

 "Manage Communities" AND
 Is a member of the

community

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

Questions and answers in the community feed are not to be confused with the Chatter Answers functionality.



- 1. Open Community Workspaces or Community Management.
- 2. If you're using Community Workspaces, access Reputation by clicking Administration > Reputation Points. If you're using Community Management, access Reputation by clicking **ReputationReputation Points**.

affected by the release, and users won't accrue points from these actions until you configure point values for them.

- 3. Update the points for each action. If you don't want users to accrue points for a certain action, set the Points to 0.
- 4. Click Save.

Point totals show up on profile pages beneath the photo. Point totals are visible to anyone in the community.



🚺 Tip: You can directly update reputation points for a community member via the Salesforce API. You can also use Apex triggers to send custom notifications based on changes to reputation points.

SEE ALSO:

Set Up Reputation Levels

# How is my community reputation calculated?

The reputation level on your profile is calculated based on your total points.

Points are accrued when you perform activities that your community manager has assigned point values. You could also potentially gain points if your posts or comments draw reaction from other community members. For example, your community manager may have decided that writing a post earns you 5 points. If someone else shares your post, your community manager may decide that you should earn 10 points because your post is influencing others to contribute.



Note: Only active users accrue points. For example, if an active user likes the post of an inactive user, the active user gets 1 point, but the inactive user does not get points.

Default point values are as follows. Keep in mind that your community manager may have customized these values. For more information, contact your community manager.

# **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

Action	Points
Community Engagement	
Write a post	1

Action	Points
Write a comment	1
Receive a comment	5
Like something	1
Receive a like	5
Share a post	1
Someone shares your post	5
Mention someone	1
	If your post contains more than one @mention, you get a point for each @mention.
Receive a mention	5
Questions and Answers	
Ask a question	1
Answer a question	5
Receive an answer	5
Mark an answer as best	5
Your answer is marked as best	20
Knowledge	
Endorsing someone for knowledge on a topic	5
Being endorsed for knowledge on a topic	20

#### 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 AppExchange Packages for Community Management

The Salesforce Communities Management packages give community managers an essential starter set of dashboards and reports to keep tabs on activity and engagement directly in Community Management or Community Workspaces.

# EDITIONS

Available in: Salesforce Classic and Lightning Experience

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 with Custom Reports

Create custom reports to track usage, moderation, and other community activity.

#### Google Analytics<sup>™</sup> for Salesforce Communities Package

The Google Analytics for Salesforce Communities package contains pre-configured reports that track search activity within a community.

# Report on Communities with the AppExchange Packages for Community Management

The Salesforce Communities Management packages give community managers an essential starter set of dashboards and reports to keep tabs on activity and engagement directly in Community Management or Community Workspaces.

Use the Salesforce Communities Management package to:

- Take advantage of the newest features using preconfigured reports (use the latest package version)
- View the latest metrics and rapidly spot trends
- Determine how fast your community is growing
- Find out who your most engaged members are
- Discover which discussions people and groups are most excited about
- Identify areas in your community that need attention
- Take immediate action on recent activity with Insights reports



Note: To use the preconfigured Insights reports, your community must use Chatter.

During installation, dashboard and report folders are automatically installed in your internal org.

You'll also have the option to give your community managers access to the package contents so you don't have to share the dashboard and report folders with them later. If you have no previous Insights or dashboards mapped in Community Management or Community Workspaces, they are automatically mapped for you during installation.

After the package is installed, you can access your new dashboards and reports alongside all your other Salesforce dashboards and reports. When you view the dashboards in Community Management or Community Workspaces, community-specific data is displayed.

#### IN THIS SECTION:

#### What's New?

The new streamlined Community Workspaces centralizes all your community needs, whether you're moderating, building, or administering your community. You can also access quick links to frequently visited pages, catch up on release notes, and dive into Help & Training. Search reports have become even more powerful. Now search reports show which search terms produced no results in the community and which ones did. Admins can also see the average number of results per search term and which searches were confined to a specific subset of records.

# EDITIONS

Available in: Salesforce Classic

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

### **USER PERMISSIONS**

To install AppExchange packages:

 "Download AppExchange Packages"

#### Install the Package

Any internal user with the necessary permissions can install the Salesforce Communities Management package, as long as Salesforce Communities is enabled in your Salesforce org.

#### **Upgrade Considerations**

During upgrades, your customizations are preserved. We don't overwrite anything you've tweaked. However, we can't port over your customizations to new versions of the components. You must recreate your customizations in the new package components. If we update existing components, we recommend that you recreate any customizations you've made and then delete the older component versions.

#### Install the Upgrade

If you have a previously installed version of the package, you can upgrade when a newer package becomes available.

#### Post-Upgrade Checklist

Upgrading can sometimes be tricky. We give you lots of amazing components each release, but we don't have the power to automatically remove components when we create a better version. Make sure you review the Unsupported Components list. If you haven't made any customizations to our reports and dashboards, we recommend that you delete all the unsupported components.

#### Insights Vs. Dashboards—What's the Difference

Use Insights to view, monitor, and act on your community's activity. Insights give you a super-focused look at a specific area while helping you with day-to-day community management. Insights can help you prioritize your work and give you instant access to what matters most.

#### Community Management Insights

The Salesforce Communities Management package provides a set of Insights reports that let you monitor recent activity and drill down to the source of that activity to take further action.

#### Community Management Dashboards Descriptions

The Salesforce Communities Management package provides a set of dashboards, each with its own source reports, and a set of custom report types. The available reports depend on whether you install the package for communities that have Chatter, or the package for communities that don't.

#### Salesforce Org Dashboard and Report Descriptions

You must view the Chatter and Licenses dashboards and reports from your internal Salesforce org.

#### **Custom Report Type Descriptions**

The reports in this package are based on a set of communities-focused custom report types, which you can customize to enhance reporting capabilities with more fields.

#### The Power of Customization

The dashboard and reports provided in the package are a great start, but they may not be exactly what your community needs. With a few simple steps, you can customize the provided dashboards and reports to suit your needs. To customize a report, open the **Reports** tab and click the report name you want to modify, then click **Customize**.

#### **Unsupported Components**

The following list identifies which reports are no longer supported in this release.

#### SEE ALSO:

Enable and Map Insights for Community Managers

Enable and Map Dashboards for Community Managers

What's the difference between Insights and dashboards?

### What's New?

The new streamlined Community Workspaces centralizes all your community needs, whether you're moderating, building, or administering your community. You can also access quick links to frequently visited pages, catch up on release notes, and dive into Help & Training. Search reports have become even more powerful. Now search reports show which search terms produced no results in the community and which ones did. Admins can also see the average number of results per search term and which searches were confined to a specific subset of records.



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



Tip: The \* symbol identifies all the new components in this release.

### **Enable Community Workspaces**

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

Not ready to move to Community Workspaces yet? You don't have to do a thing. Your settings stay the same unless you enable Community Workspaces. Want to check out Community Workspaces on page 15? Feel free to give it a try. You can easily revert to Community Management by deselecting **Enable Community Workspaces**.



Note: Internet Explorer® version 11 does not support Community Workspaces.

#### What's Different?

Community Workspaces offers a streamlined area to access all the tools that you need for building, managing, and tracking your community. Even though it looks different, everything you use is still there. Some things have been moved around a bit.

- Engagement reports have been moved into the Dashboard workspace. Reporting dashboards and your Home dashboards are also located in the Dashboard workspace.
- Recommendations and Topics are in the new Content Targeting workspace.
- Moderation pages have been organized into separate areas within the Moderation workspace. You can access moderation Insights from the Home tab and create and customize moderation rules, member criteria, and content criteria from the Rules tab.
- Want to jump to another workspace from the workspace you are in? It's easy! Click the icon in the upper-left corner and a navigation dropdown menu appears. You can also switch between communities without leaving Community Workspaces.



Note: We encourage you to switch Community Workspaces, as future updates are based on the Community Workspaces framework.

#### IN THIS SECTION:

#### Salesforce Community Management Package with Chatter

The Community Management package delivers the insights, dashboards, reports, and moderation controls community managers need, to drive adoption, monitor engagement, and build a vibrant community.

#### Salesforce Community Management Package Without Chatter

The Community Management package delivers the dashboards and reports community managers use, to drive adoption, monitor engagement, and build a vibrant community.

**EDITIONS** 

Experience

Available in: Salesforce Classic and Lightning

Available in: Enterprise,

and **Developer** Editions

Performance, Unlimited.

### Salesforce Community Management Package with Chatter

The Community Management package delivers the insights, dashboards, reports, and moderation controls community managers need, to drive adoption, monitor engagement, and build a vibrant community.

Version 9.0 features include:

New custom report types:

- Network Moderation Flagged Direct Messages 1.0
- Related Ouestions CTR 1.0
- Community Searches 2.0

New reports to track question click-through-rates, flagged Direct Messages, and search results.

A new Community Search Dashboard 2.0, that provides even more information about your community's search behavior.

Unsupported old reports and dashboards—if you're upgrading, remove these components manually.

## Salesforce Community Management Package Without Chatter

The Community Management package delivers the dashboards and reports community managers use, to drive adoption, monitor engagement, and build a vibrant community.

Version 7.0 features:

New reports to track search results

New dashboards:

- New Community Search Dashboard 2.0, that provides information about your community's search behavior.
- Unsupported old reports and dashboards—if you're upgrading, remove these components manually

# EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

# Install the Package

Any internal user with the necessary permissions can install the Salesforce Communities Management package, as long as Salesforce Communities is enabled in your Salesforce org.

If you're upgrading from a previous version of this package, review the Upgrade Considerations and then follow the steps in Install the Upgrade. Be sure to check the unsupported components list and delete them from your organization.



- 1. Select **AppExchange** from the Force.com Apps drop-down list. You can also click here.
- **2.** Search the AppExchange site for Salesforce Communities Management (for Communities with Chatter) or Salesforce Communities Management (for Communities without Chatter).
- 3. Click **Get It Now** on the application information page. If prompted, log in to the AppExchange.
- 4. Click Install in Production.
- **5.** Review the terms and conditions, select **I have read and agreed to the terms and conditions**, then click **Confirm and Install**.

## **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

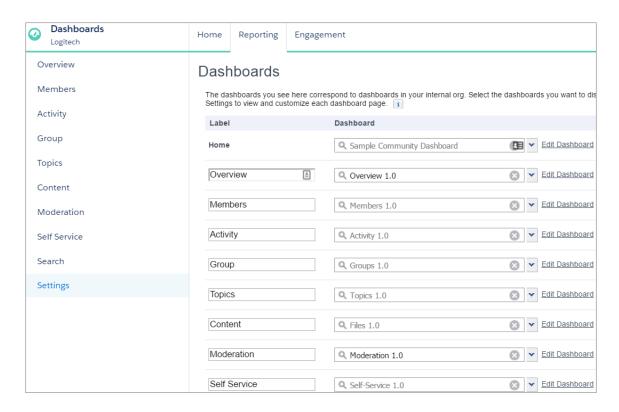
Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

### **USER PERMISSIONS**

To install packages:

 "Download AppExchange Packages"

- 6. Click Install for Specific Profiles to grant access to the users who will be working with the reports and dashboards.
- 7. Review the list of API access that the package components have been granted access to, then click Next.
- 8. Click Install.
- **Example:** Report folder mapping in the Dashboard workspace of Community Workspaces.



If this is your first time installing the package, or you don't have any current mappings for your Community Management or Community Workspaces, the package automatically maps the Insights report folders and dashboards for you.



**Note**: If you have an earlier version of the package installed, we recommend that you uninstall it before reinstalling the new version. If you've customized any of your reports, you can upgrade the package without uninstalling your current version. Click here for more information about what to consider when upgrading.

The Installed Package Detail page confirms when installation is complete. In your Salesforce org, look in the Reports tab for the following folders.

Folder Name	Description	Package with Chatter	Package without Chatter
Communities Dashboards	Provides the License Usage 1.0 and Community Search Dashboard 2.0 dashboards.	<b>✓</b>	~
	Note: Don't map these dashboards in Community Management; view them in your internal org.		

Folder Name	Description	Package with Chatter	Package without Chatter
Lighting Communities Dashboards	Provides the dashboards that map to <b>Dashboards</b> in Community Management and Community Workspaces, including your home page.	✓	
	Note: Installing the package doesn't auto-map a dashboard for your home page, you must map one yourself.		
Communities Reports	Provides the reports used in your Community Management dashboards. These reports are used in the dashboards in <b>Dashboards</b> > <b>Reporting</b> if you are using Community Workspaces.	<u>~</u>	<b>▽</b>
Community Management Home Reports	Provides the reports used in your Community Management home dashboard. These reports are in <b>Dashboards</b> > <b>Home</b> if you are using Community Workspaces.	✓	<b>▽</b>
Insights Adoption 2.0 Insights Activity 2.0 Insights Files 2.0 Insights Groups 2.0 Insights Self-Service 2.0 Insights Topics 2.0	Each folder includes reports for the mapped <b>Insights</b> pages in Community Management Engagement or in <b>Dashboards</b> > <b>Engagement</b> if you are using Community Workspaces.	✓	
Moderation Audit Trail Moderation Flagged Moderation Pending Moderation Users	Each folder includes reports for the mapped <b>Insights</b> pages in Community Management Moderation or in <b>Moderation</b> > <b>Moderate</b> if you are using Community Workspaces.	▼	
Misc Communities Reports	Provides reports that are feature-dependent, such as reports that require Chatter messages, direct messages, or the community case feed.	~	
Chatter Dashboards	Provides reports and dashboards to track Chatter	~	
Chatter Reports	usage in your internal Salesforce org.  Note: These folders don't map to anything in Community Management or Community Workspaces	<b>✓</b>	



**Note**: If you are installing the package for Communities without Chatter, you also still have a Community Management Home Dashboards folder.

# **Upgrade Considerations**

During upgrades, your customizations are preserved. We don't overwrite anything you've tweaked. However, we can't port over your customizations to new versions of the components. You must recreate your customizations in the new package components. If we update existing components, we recommend that you recreate any customizations you've made and then delete the older component versions.

### Has it been a few releases since you've upgraded?

If so, we recommend that you start with a clean slate. First, remove any mappings you have in Community Management, and then uninstall the package entirely. Once you've done that, you can reinstall the latest-and-greatest version of the package.

(1) Important: If you've customized the components we provide, don't use this approach. Install the upgrade normally, and then recreate your customizations in the newer versions. Then you can safely delete your old versions.

### **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

Note: Versioning is handled at the component level: dashboards, reports, and custom report types. If a component is updated, its version is updated. For a list of new components, see What's New?. Because of the way we map Insights reports in Community Management, we also version the Insights folders. If we make major changes to Engagement or Moderation, we provide an updated version of each Insights folder within that page.

# Install the Upgrade

If you have a previously installed version of the package, you can upgrade when a newer package becomes available.

Upgrading doesn't overwrite the original custom report types, dashboards, or reports.

- (1) Important: Customizations are not ported to the new package. If we updated components that you've customized, you must recreate your customizations in the new component versions. Recreate your customizations before continuing to the next step.
- 1. Review the upgrade considerations.
- 2. Install the Package. Installing an upgrade is just like a clean install. After you install the package, click Reports in your internal Salesforce org to check out your new folders and components. Dashboard and report names are suffixed with version numbers so you can easily identify the new items.
- **3.** Review What's New? to see if we updated any components that you've customized. You can also look for this symbol in the document to identify new components.
- **4.** In Community Management or the Dashboard workspace, review and update your dashboard and Insights mappings. Click**Dashboards** > **Settings** or **Engagement** > **Settings**.

We recommend that you verify your dashboard mappings are using the latest version of all the dashboards.

5. If applicable, delete any reports, dashboards, or custom report types that were updated or are now unsupported to avoid confusion and ensure your community managers always use the latest and greatest.
For more information, see What's New? and Unsupported Components.

# EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

### **USER PERMISSIONS**

To install packages:

"Download AppExchange Packages"

# Post-Upgrade Checklist

Upgrading can sometimes be tricky. We give you lots of amazing components each release, but we don't have the power to automatically remove components when we create a better version. Make sure you review the Unsupported Components list. If you haven't made any customizations to our reports and dashboards, we recommend that you delete all the unsupported components.

If you're upgrading to the Communities Management (for Communities with Chatter) 9.0 package, complete these steps:

Delete all the reports in the original Insights folders and also delete those original folders. Then in Community Management, update your mapping to use the Insights 2.0 folders. For example, you can delete the Insights Adoption folder and all of its contents, but keep the Insights Adoption 2.0 folder. Keep in mind that if you made any customizations to the Insights

reports, they don't port over to the updated versions, and you'll lose those customizations if you delete those reports.

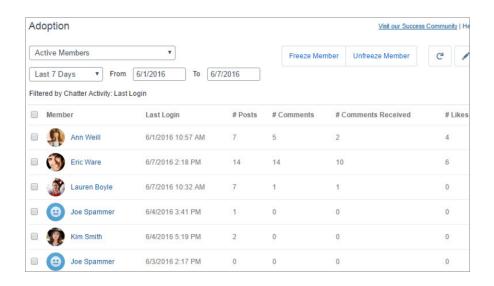
• Make sure the License Usage 1.0 dashboard is **not** mapped in Community Management. View this dashboard only in your internal Salesforce org, not in Community Management.

• If you still see version numbers on your Communities Dashboards and Communities Reports folders, remove them from the folder names and merge all the reports into one folder. Your reports and dashboards aren't affected by renaming the folders. Review the list of report and dashboard folders that should be included in your org.

# Insights Vs. Dashboards—What's the Difference

Use Insights to view, monitor, and act on your community's activity. Insights give you a super-focused look at a specific area while helping you with day-to-day community management. Insights can help you prioritize your work and give you instant access to what matters most.

You can visit the Adoption page under **Insights**, or under **Dashboards** > **Engagement** if you are using Community Workspaces, to take action on activity from your new members. For example, you can view a report about new members that have received the most likes on their posts and comments. This Insights report helps you identify and engage with your active new members.



### **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

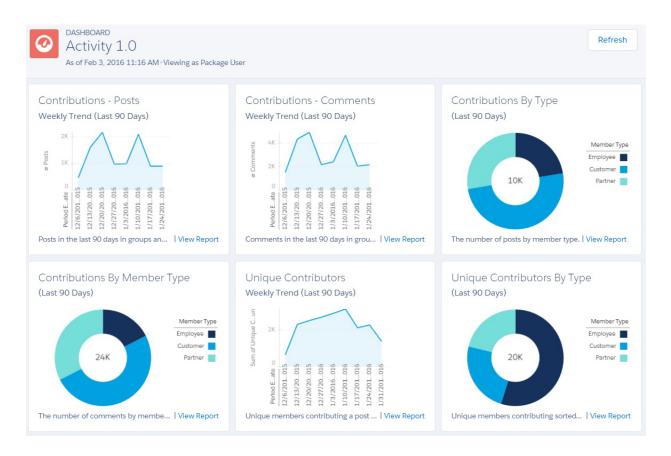
## **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

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

You can visit the **Dashboards** > **Activity** page to track total posts and comments including overall contribution trends in your community.



# **Community Management Insights**

The Salesforce Communities Management package provides a set of Insights reports that let you monitor recent activity and drill down to the source of that activity to take further action.

**①** 

**Important**: Insights are only available in the Communities Management AppExchange package with Chatter.

When you view Insights in Community Management or Community Workspaces, reports automatically display data specific to the community you're managing. Insights reports are arranged into two sections, Engagement and Moderation. You can switch between reports by using the drop-down menus on the Engagement or Moderation pages.

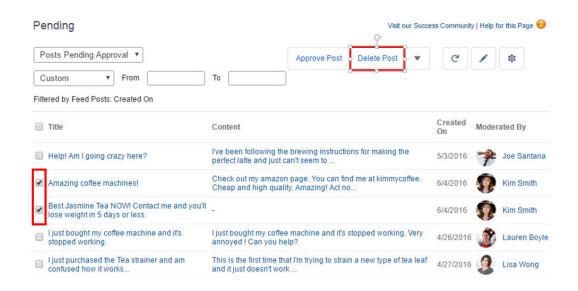
# EDITIONS

Available in: Salesforce Classic and Lightning Experience

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



Actionable Insights are available in all orgs with Communities. All you need is a report to use them with. Each Insights report has different actions. Insights report, click to edit the actions assigned to the report. You can find more information about viewing, customizing and configuring Insights and actions in the Salesforce help.

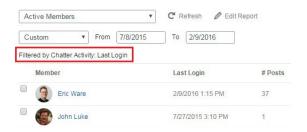


? Tip: Insights let you know how the report is filtered.

You can edit this label to be more descriptive.

- 1. Use the tables in this document to identify the custom report type for your Insights report.
- 2. In your internal Salesforce org, from Setup enter Report Types in the Quick Find box, and then select Report Types.
- 3. Click the name of the custom report type you want to edit, then click **Edit Layout**.
- 4. To change a label, select the field you want to update and click Edit Properties and then save your work.

5. Verify your changes in Community Management or Community Workspaces.



You can learn more about editing field layouts in the Salesforce Help.

#### IN THIS SECTION:

#### **Adoption Insights**

Use the Adoption Insights page to monitor member activity.

#### **Activity Insights**

Use the Activity Insights page to track posts and comments in groups.

#### Files Insights

Use the Files Insights page to monitor file uploads and downloads, including files receiving lots of comments. With Files Insights, you can monitor files by community engagement and file type.

#### **Groups Insights**

Use the Groups Insights page to help manage your groups.

#### **Moderation Insights**

Use the Moderation Insights page to track flagged posts, files, messages, and content flagged by moderation rules.

#### Self-Service Insights

Use the Self-Service Insights page to track questions and answers in user profiles, including questions escalated to cases.

#### **Topics Insights**

Use the Topics Insights page to keep an eye on recent topics.

#### **Adoption Insights**

Use the Adoption Insights page to monitor member activity.

With Adoption Insights, you can:

- Identify and welcome your new members
- Drive adoption and engagement in your community
- Re-engage with your community's top contributors

Report Name	Description	<b>Custom Report Type</b>
Active Members	Members who logged in to your community in the last 7 days with Chatter activity, such as a post or like.	Network Member Activity 1.0
Active Members With No Picture	Members without a user profile picture who logged in to your community in the last 7 days.	Chatter Activity 1.0

Report Name	Description	<b>Custom Report Type</b>
Contributors Inactive For 7+ Days 2.0	Members with the most posts and comments who are now inactive. These members haven't logged in to the community in the last 7 days, but have logged in once during the last 30 days. This report includes only members with more than 5 posts or 5 comments.	Network Member Activity 1.0
	(1) Important: Adjust the report filters to fit your community.	
Influencers Inactive For 7+ Days 2.0	Members with the most likes and comments received who are now inactive. These members haven't posted in the last 7 days, but have logged in to the community in the last 30 days. This report includes only members with at least 5 likes or 5 received comments.  ① Important: Adjust the report filters to fit your community.	Network Member Activity 1.0
Influencers With No Picture	Members with the most likes and comments received, who have no user profile picture. This report includes only members with at least 5 likes or 5 received comments.  [] Important: Adjust the report filters to fit your community.	Chatter Activity 1.0
New Contributors With No Picture	Members without a user profile picture, who registered in the last 7 days and also posted or commented recently.	Chatter Activity 1.0
New Members	New members who registered in the last 7 days with Chatter activity, such as a post or like.	Network Member Activity 1.0
Recent Contributors 2.0	New members active in Chatter groups or user profiles in the last 7 days, sorted by most recent activity.	Network Members 3.0
Recent Contributors With No Picture	New members without a user profile picture, active in Chatter groups or user profiles in the last 7 days, sorted by most recent activity.	Network Members 3.0
Recent Logins Successful	External users with the most recent successful logins to the community during the last 7 days. This report only includes direct logins to the community. If a user logs into an org and then switches to a community, their login activity isn't included.	Network Login History 5.0

# **Activity Insights**

Use the Activity Insights page to track posts and comments in groups.

With Activity Insights, you can:

- Moderate recent discussions, including identifying posts with no comments
- Monitor your community's hot discussions
- Moderate group activity from new members

Report Name	Description	<b>Custom Report Type</b>	
New Discussions 2.0	New group discussions created in the last 7 days, sorted by the newest post.	Network Groups Activity 3.0	
New Members' Comments 2.0	Group comments created in the last 7 days by a member who registered in the last 30 days. This report is sorted by the highest number of likes.	Network Groups Activity 3.0	
New Members' Posts 2.0	Group posts created in the last 7 days by a member who registered in the last 30 days.	Network Groups Activity 3.0	
Recent Discussions	Group discussions created in the last 30 days.	Network Groups Activity 3.0	

# Files Insights

Use the Files Insights page to monitor file uploads and downloads, including files receiving lots of comments. With Files Insights, you can monitor files by community engagement and file type.

Report Name	Description	<b>Custom Report Type</b>
Files With Activity	Files with comments, likes, or downloads.	File and Content Report
New Image Files 2.0	Image files uploaded in the last 7 days, sorted by the most recent upload.	File and Content Report
New Office Files 3.0	Office files uploaded in the last 7 days, sorted by the most recent upload.	File and Content Report
New Video Files 2.0	Video files uploaded in the last 7 days, sorted by the most recent upload.	File and Content Report
Recent Files (All) 2.0	Files uploaded in the last 7 days, sorted by the most recent upload.	File and Content Report

### **Groups Insights**

Use the Groups Insights page to help manage your groups.

With Groups Insights, you can:

- Moderate newly created groups
- Manage groups with deactivated or inactive owners
- Manage groups that will soon be archived

Report Name	Description	<b>Custom Report Type</b>
Best Answers From Groups 1.0	Best Answers created in last 7 days from Groups, sorted by the most recent answers.	Network Group Q&A Activity 1.0
Groups Recently Archived 2.0	Groups that were automatically archived in the last 15 days, sorted by the most recent contribution date. The report doesn't include groups manually archived by a user.	Network Group Membership 3.0

Report Name	Description	<b>Custom Report Type</b>
Groups Soon To Be Archived 2.0	Groups that are scheduled to be archived in the next 15 days, sorted by the soonest archive date.	Network Group Membership 3.0
Groups With Deactivated Owners 2.0	Groups with owners that are deactivated. These groups are active and haven't been archived.	Network Group Membership 3.0
Groups With Inactive Owners 2.0	Groups with owners who didn't log in to the community in the last 30 days. These groups are active and haven't been archived.	Network Group Membership 3.0
New Groups	Groups added in the last 7 days.	Network Group Membership 3.0
Questions From Groups 1.0	Questions created in the last 7 days from groups, sorted by most recent.	Network Groups Q & A Activity 1.0
Questions With New Answers From Groups	Questions with answers created in last 7 days from groups, sorted by most recent answer.	Network Groups Q & A Activity 1.0
Questions Without Answers From Groups 1.0	Questions created in the last 7 days without answers from groups, sorted by most recent question.	Network Groups Q & A Activity 1.0
Questions With Answers From New Groups 1.0	Questions created in the last 7 days with answers from new groups, sorted by most recent question.	Network Groups Q & A Activity 1.0
Questions From New Groups 1.0	Questions created in the last 7 days from groups, sorted by most recent question.	Network Groups Q & A Activity 1.0

# **Moderation Insights**

Use the Moderation Insights page to track flagged posts, files, messages, and content flagged by moderation rules.

With Moderation Insights, you can:

- Monitor content blocked, flagged, or replaced by rules
- Monitor spammers or new members
- Monitor types of flagged messages including notes from customer
- Monitor private messages from new members (for details, see the Misc Communities Reports section)

Report Name	Description	<b>Custom Report Type</b>
Flagged Comments 3.0	Comments flagged in the last 7 days.	Network Moderation Flagged Comments 2.0
Flagged Files 3.0	Files flagged in the last 7 days.	Network Moderation Flagged Files 2.0
Flagged Private Messages 3.0	Chatter messages flagged in the last 7 days.	Network Moderation Flagged Messages 2.0
Flagged Direct Messages 1.0	Direct Messages flagged in the last 7 days.	Network Moderation Flagged Direct Messages 1.0
→ Flagged Posts 3.0	Posts flagged in the last 7 days.	Network Moderation Flagged Posts 2.0

Report Name	ort Name Description	
Frozen Members 2.0	Members frozen in the last 7 days.	Network Frozen Members 2.0
Posts Pending Approval	Feed posts pending approval.	Network Posts Pending Approval 2.0
Moderation Audit 2.0	All moderation audits in the last 7 days. This includes flagging by users, moderation rules, and moderator actions.	Network Activity Audit 1.0

### Self-Service Insights

Use the Self-Service Insights page to track questions and answers in user profiles, including questions escalated to cases.

With Self-Service Insights, you can monitor and act on:

- Recently-created questions
- Questions and answers from new members to help drive adoption
- Questions escalated to cases (for details, see the Misc Communities Reports on page 378 section)



Note: This Insights page supports communities using the Napili template.

Report Name	Description	<b>Custom Report Type</b>
Best Answers 2.0	Questions with a best answer added in the last 7 days.	Network User Activity 3.0
Best Answers From External Members 2.0	Questions with a best answer from an external user added in the last 7 days.	Network User Activity 3.0
Questions 2.0	Questions added in the last 7 days.	Network User Activity 3.0
Questions From New Members 2.0	Questions added in the last 7 days by new members. A member is considered new if they joined the community less than 30 days ago.	Network User Activity 3.0
Questions With Answers From New Mem 2.0	Questions with answers from new members in the last 7 days. A member is considered new if they joined the community less than 30 days ago. This report is sorted by the most recent question.	Network User Activity 3.0
Questions With New Answers 2.0	Questions with a new answer that has been added in the last 7 days. This report is sorted by the most recent answer.	Network User Activity 3.0
Questions Without A Best Answer 2.0	Questions with answers in the last 7 days that still don't have a best answer.	Network User Activity 3.0
Questions Without Answers 2.0	Questions added in the last 7 days that haven't been answered.	Network User Activity 3.0

### **Topics Insights**

Use the Topics Insights page to keep an eye on recent topics.

With Topics Insights, you can:

- Manage topic assignments
- Monitor new topics

Report Name	Description	<b>Custom Report Type</b>
Topics Added 2.0	Topics created in the last 7 days.	Network Topics 3.0
Topics Assigned 2.0	Topics assigned in the last 7 days.	Network Topic Assignments 3.0
Topics Most Talked About 2.0	Topics created in the last 7 days with the highest "Talked About" score.	Network Topics 3.0

### **Community Management Dashboards Descriptions**

The Salesforce Communities Management package provides a set of dashboards, each with its own source reports, and a set of custom report types. The available reports depend on whether you install the package for communities that have Chatter, or the package for communities that don't.

After installing the package, when you view the dashboards from Community Management or Community Workspaces, reports automatically display data specific to the community you're accessing the report from. To view data from across all your communities, view the dashboard in your internal Salesforce org.

**Important:** For the package without Chatter, you only get: two home dashboards and the Overview, Members, and Licenses Usage dashboards.

### **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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



- Trending metrics are calculated daily and the calculation starts the day after a release. Trending metrics work only in active Salesforce orgs. To collect trending metrics in non-active orgs, contact Salesforce.
- Filtering is not supported on standard report types.

#### IN THIS SECTION:

#### Home Dashboard and Reports

When you access Community Management, your home dashboard is the first thing you see. It ensures that you stay up to date and is customizable to fit your community needs.

#### Overview Dashboard and Reports

Use the Overview dashboard to track membership growth, login trends, and members' post and comment activity in Chatter.

#### Activity Dashboard and Reports

Use the Activity dashboard to track engagement and activity levels, based on members' Chatter activity.

#### **Chatter Edits Reports**

Use these reports to track Chatter edits in your community.

#### Community Search Dashboard and Reports

Use the Community Search Dashboard to track search activity in the community.

#### Files Dashboard and Reports

Use the Content dashboard to track content uploads, downloads, engagement, and content creators.

#### Custom Recommendations Dashboard and Reports

Use the Custom Recommendations dashboard to see how your community's custom recommendations are doing.

#### **Groups Dashboard and Reports**

Use the Groups dashboard to monitor feed and member activity in Chatter groups.

#### Members Dashboard and Reports

Use the Members dashboard to track community membership, new members added, and external member logins over time.

#### Moderation Dashboard and Reports

Use the Moderation dashboard to track community moderators' and members' flagging activity.

#### **Q&A** Dashboard and Reports

Use the Q & A dashboard to track recent activity for questions, answers, and best answers posted in groups

#### Self-Service Dashboard and Reports

The Self-Service dashboard tracks activity in the self-service template.

#### **Topics Dashboard and Reports**

Use the Topics dashboard to track your community topics.

#### Misc Communities Reports

The reports provided in this folder are feature-dependent or require special user permissions. You can add these reports to Insights folders or dashboards in Community Management or Community Workspaces. These reports are provided in the **Misc Communities Reports** folder.

### Home Dashboard and Reports

When you access Community Management, your home dashboard is the first thing you see. It ensures that you stay up to date and is customizable to fit your community needs.

We provide dashboards for short-term and long-term data, with options for communities with or without Chatter and self-service communities.

The Sample Community Dashboard automatically maps to your home page. To change the mapping of the dashboard, go to Dashboards > Settings in Community Management. If you've enabled Community Workspaces, the Home dashboard is in the Dashboards workspace.



Tip: If you want your home dashboard to include metrics and reports about your community's cases, see Misc Communities Reports. You can also Create a Dashboard for Your Community.

Sample home dashboard for Communities with Chatter



#### IN THIS SECTION:

#### Home Dashboards

For the package with Chatter, these dashboards are provided in the **Lightning Communities Dashboards** folder. For the package without Chatter, these dashboards are in the **Community Management Home Dashboards** folder.

### Home Reports

These reports are provided in the **Community Management Home Reports** folder.

#### Home Dashboards

For the package with Chatter, these dashboards are provided in the **Lightning Communities Dashboards** folder. For the package without Chatter, these dashboards are in the **Community Management Home Dashboards** folder.

Dashboard Name	Description	Package with Chatter	Package Without Chatter
Activity in Your Community in the Last 90 Days	Dashboard for communities with Chatter.	✓	
Activity in Your Community in the Last 12 Months		~	

Dashboard Name	Description	Package with Chatter	Package Without Chatter
Activity in Your Self-Service Community in the Last 90 Days	Dashboard for self-service communities, such as communities using the Napili template.	~	
Activity in Your Self-Service Community in the Last 12 Months		~	
Activity in Your Community in the Last 30 Days	Dashboard for communities without Chatter.		~
Activity in Your Community in the Last 12 Months			~

# Home Reports

These reports are provided in the **Community Management Home Reports** folder.

Report Name	Description	Custom Report Type	Package with Chatter	Package Without Chatter
Active Contributors	Total number of members who created a post or comment in the last 30 days in groups of user profiles.	Network Login History 5.0	~	
Active Users	Total number of external users who logged in at least once in the last 30 days.	Network Login History 5.0	~	~
Answers	Total number of answers in the last 30 days.	Network Activity Daily Metrics 2.0	~	
Best Answers	Total number of best answers in the last 30 days.	Network Activity Daily Metrics 2.0	~	
Best Answers - Daily Trend	Daily trending report on best answers in the last 30 days.	Network Activity Daily Metrics 2.0	~	
Best Answers - Monthly Trend	Monthly trending report on best answers in your community.	Network Activity Daily Metrics 2.0	~	
Best Answers - Weekly Trend	Weekly trending report on best answers in your community.	Network Activity Daily Metrics 2.0	~	
Comments	Total number of comments in groups and user profiles in the last 30 days.	Network Activity Daily Metrics 2.0	~	
Contributions	Total number of posts and comments in the last 30 days across groups and user profiles.	Network Activity Daily Metrics 2.0	~	

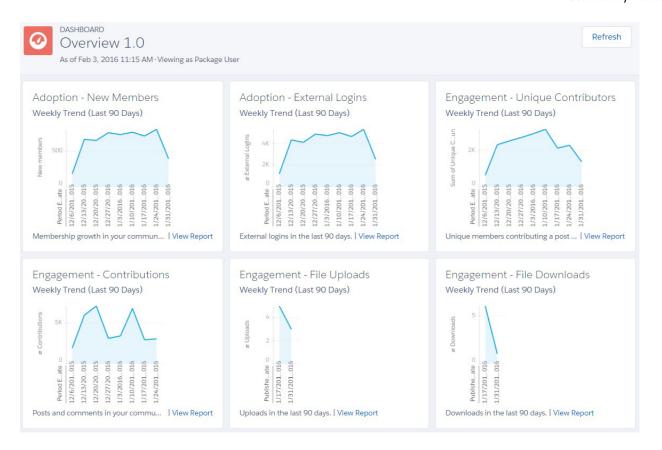
Report Name	Description	Custom Report Type	Package with Chatter	Package Without Chatter
Contributions - Monthly Trend	Monthly trending report on the number of posts and comments in groups or user profiles in your community.	Network Activity Daily Metrics 2.0	<b>▽</b>	
Contributions - Weekly Trend	Weekly trending report on the number of posts and comments in groups or user profiles in the last 90 days.	Network Activity Daily Metrics 2.0	~	
File Activity - Monthly Trend	Monthly trending report on the total number of files uploaded and downloaded in groups or user profiles in the last 12 months.	File and Content Report	~	
File Downloads	Total number of files downloaded from groups or user profiles in the last 30 days.	File and Content Report	~	
File Uploads	Total number of files uploaded to groups or user profiles in the last 30 days.	File and Content Report	~	
Logins	Total number of logins to the community in the last 30 days.	Network Membership Daily Metrics 2.0	~	~
Logins - Daily Trend	Daily trending report on member logins in the last 30 days. This report doesn't include employees who log in to your internal Salesforce org and then switch to the community.	Network Membership Daily Metrics 2.0	✓	
Logins - Monthly Trend	Monthly trending report on member logins in your community. This report doesn't include employees who log in to your internal Salesforce org and then switch to the community.	Network Membership Daily Metrics 2.0	✓	
Logins External - Monthly Trend	Monthly trending report on customer and partner member logins in your community. This report doesn't include logins from employees.	Network Membership Daily Metrics 2.0	~	
Members	Total number of members in the community.	Network Members 3.0	~	~
New Members	Total number of new members added to the community in the last 30 days.	Network Membership Daily Metrics 2.0	<b>✓</b>	<b>~</b>
New Members - Daily Trend	Daily trending report on new members added in the last 30 days.	Network Membership Daily Metrics 2.0		~
New Members - Monthly Trend	Monthly trending report on new members added in your community.	Network Membership Daily Metrics 2.0	~	~
Page Views - Monthly Trend	Monthly trending report on the daily page views generated by guest users in your community.	Network Public Usage Daily Metrics 2.0	~	
Page Views - Weekly Trend	Weekly trending report on the daily page views generated by guest users in your community.	Network Public Usage Daily Metrics 2.0	~	

Report Name	Description	Custom Report Type	Package with Chatter	Package Without Chatter
Posts	Total number of posts in groups and user profiles in the last 30 days.	Network Activity Daily Metrics 2.0	~	
Q&A - Monthly Trend	Monthly trending report on questions and answers in your community.	Network Activity Daily Metrics 2.0	~	
Q&A - Weekly Trend	Weekly trending report on questions and answers in your community.	Network Activity Daily Metrics 2.0	~	
Questions	Total number of questions in the last 30 days.	Network Activity Daily Metrics 2.0	~	
Topics	Total number of topics assigned to discussions in groups or user profiles in the last 30 days.	Network Topic Assignments 3.0	~	
Unique Contributors - Daily Trend	Daily trending report on the number of unique daily contributors in the last 30 days. A unique contributor is someone who posts or comments at least once in groups or user profiles.	Network Public Usage Daily Metrics 2.0	<b>✓</b>	
Unique Contributors - Monthly Trend	Monthly trending report on the average unique daily contributors in your community. A unique contributor is someone who posts or comments at least once in groups or user profiles.	Network Unique Contributor Daily Metrics 2.0	✓	
Unique Visitors - Monthly Trend	Monthly trending report of the daily unique visitors, people that visited the community at least once that day, in the last 12 months.	Network Public Usage Daily Metrics 2.0	<b>▽</b>	

## Overview Dashboard and Reports

Use the Overview dashboard to track membership growth, login trends, and members' post and comment activity in Chatter.

- How contributions are trending
- How group membership is trending
- How topics and assignments are trending
- How question and answers are trending
- How files are trending



(!) Important: For information about the reports provided in the Overview dashboard for the package without Chatter, refer to what's installed in your org.

Report Name	Description	Custom Report Type	On Dashboard?
C - File Activity L90D	Reports on the number of uploads and downloads in your community in the last 90 days.	File and Content Report	~
Contributions - Weekly Trend	Weekly trending report on the number of posts and comments in groups or user profiles in the last 90 days.	Network Activity Daily Metrics 2.0	~
Daily Unique Contributors (Last 90 Days)	Unique members contributing a post or comment in the last 90 days.	Network Unique Contributor Daily Metrics 2.0	~
MO - Flags L90D	Trending report of flagged content in your community in the last 90 days.	Network Moderation 2.0	~
New Members (Last 90 Days Trend)	Newly joined members in the last 90 days.	Network Membership Daily Metrics 2.0	~
O - External Logins L90D	External logins by community member type in the last 90 days.	Network Membership Daily Metrics 2.0	~

Report Name	Description	Custom Report Type	On Dashboard?
T - Topics Assigned L90D	Topics assigned in the last 90 days.	Network Topic Assignments 3.0	~
T - Topics Created L90D	Topics added in the last 90 days.	Network Topics 2.0	~

## **Activity Dashboard and Reports**

Use the Activity dashboard to track engagement and activity levels, based on members' Chatter activity.

With this dashboard, you can answer:

- How many posts and comments are there?
- How many members are contributing and are there any members that aren't contributing?
- Which posts are the most commented on or liked?



(1) Important: This dashboard and its reports are only available in the package with Chatter.

Report Name	Description	Custom Report Type	On Dashboard?
A - # Comments	Total number of comments in groups and user profiles.	Network Activity Daily Metrics 2.0	
A - # Comments L30D	Total number of comments in groups and user profiles in the last 30 days.	Network Activity Daily Metrics 2.0	
A - # Comments Per Post	The average number of comments per post.	Network Activity Daily Metrics 2.0	
A - # Comments Per Post L30D	The average number of comments per post in the last 30 days.	Network Activity Daily Metrics 2.0	
A - # Members Contributing L30D	Members who have contributed to Chatter in the last 30 days.	Network Members 2.0	
A - # Members Who Never Contributed	Members who have never contributed to Chatter.	Network Members 2.0	
A - # Posts	Total number of posts in groups and user profiles.	Network Activity Daily Metrics 2.0	
A - # Posts L30D	Total number of posts in groups and user profiles in the last 30 days.	Network Activity Daily Metrics 2.0	
A - Contributions By Member Type L90D	Trending report on posts and comments in the last 90 days in groups and user profiles, sorted by member type.	Network Activity Daily Metrics 2.0	~
A - Contributions L90D	Trending report on posts and comments in the last 90 days in groups and user profiles.	Network Activity Daily Metrics 2.0	~
A - Unique Contributors By Type L90D	Unique members contributing a post or comment in the last 90 days.	Network Unique Contributor Daily Metrics 2.0	✓
Daily Unique Contributors (Last 90 Days)	Unique members contributing a post or comment on a given day in the last 90 days.	Network Unique Contributor Daily Metrics 2.0	<u>~</u>

## **Chatter Edits Reports**

Use these reports to track Chatter edits in your community.

These reports aren't associated with a dashboard, but you can find them in the Communities Reports folder.

**(1) Important**: These reports are *only* available in the package with Chatter.

? Tip: If you want to report on Chatter edits in your internal Salesforce org, use the reports in the **Chatter Reports** folder.

Report Name	Description	Custom Report Type
CH - # Chatter Edits	Number of Chatter edits made in the community.	Network Chatter Edits 1.0

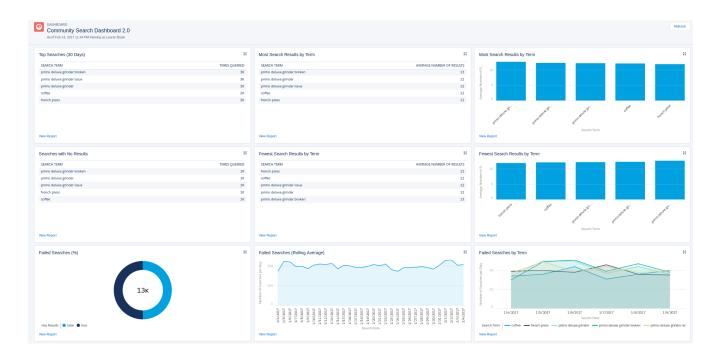
Report Name	Description	Custom Report Type
CH - Chatter Edits By Feed Type	Distribution of community Chatter edits by feed type: posts or comments.	Network Chatter Edits 1.0
CH - Chatter Edits By Member Type	Distribution of community Chatter edits by member type: internal, partner, or customer.	Network Chatter Edits 1.0
CH - Daily Chatter Edits L30D	Daily trend of Chatter edits in the community.	Network Chatter Edits 1.0

### Community Search Dashboard and Reports

Use the Community Search Dashboard to track search activity in the community.

With the Community Search Dashboard, you can track:

- Which terms are being search for by community members?
- How many members are searching for a term on a specific day?
- How many community users are logged in when they enter a search term?
- What type of community member is searching for a term?



(Important: This dashboard and its reports are available *only* in communities using the Customer Service (Napili) template and Search reports can only run in production environments.

Report Name	Description	Custom Report Type	On Dashboard?
<ul><li>Autocomplete</li><li>Click-Through % (Last 30 Days)</li></ul>	What percentage of autocomplete search results had a successful click?	Community Searches 2.0	~

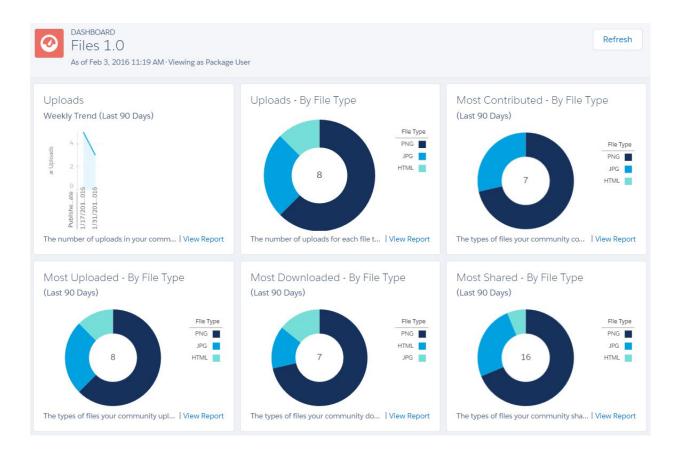
Report Name	Description	Custom Report Type	On Dashboard?
<ul><li>Autocomplete Search Usage (30 Days)</li></ul>	Are users clicking on suggested search results?	Community Searches 2.0	~
Logged-In vs Guest Search (Last 30 Days) 2.0  Note: This report has been enhanced in the current package.	How many community users are logged in when they enter a search term?	Community Searches 2.0	<b>~</b>
Most Autocomplete Clicks (30 Days)	Which search terms led to the most clicks of suggested search results?	Community Searches 2.0	~
Number of Results Per Term (30 Days)	How many search results are returned per search term?	Community Searches 2.0	~
→ Search Frequency by Term (Last 30 Days) 2.0	Which terms are being searched for by community members?	Community Searches 2.0	~
Note: This report has been enhanced in the current package.			
Searches by Member Type (Last 30 Days) 2.0	What type of community member is searching for a term?	Community Searches 2.0	~
Note: This report has been enhanced in the current package.			
Search Result Outcomes (30 days)	How many searches had results?	Community Searches 2.0	~
Searches w/ No Results, by Day (30 Days)	Which search terms had zero results on any given day?	Community Searches 2.0	<u>~</u>
Searches w/ No Results by Type (30 Days)	What type of community member is searching for a term, and did it have results?	Community Searches 2.0	<u>~</u>
<ul><li>→ Searches with Zero Results (30 Days)</li></ul>	How many search results are returned per search term?	Community Searches 2.0	<b>✓</b>

## Files Dashboard and Reports

Use the Content dashboard to track content uploads, downloads, engagement, and content creators.

- How many file uploads and downloads are there?
- Are there any file trends?

- What type of files are being distributed the most or least?
- How is file engagement?
- Which members are driving file engagement?
- **(1) Important**: This dashboard and its reports are *only* available in the package with Chatter.



Report Name	Description	Custom Report Type	On Dashboard?
C - # File Contributions	The total number of file contributions, defined as posts and comments.	File and Content Report	
C - # File Downloads	The total number of files downloaded.	File and Content Report	
C - # File Likes	The total number of file likes.	File and Content Report	
C - # File Shares	The total number of files shares.	File and Content Report	
C - # File Uploads	The total number of files uploaded.	File and Content Report	

Report Name	Description	Custom Report Type	On Dashboard?
C - File Activity By File Type L90D	Reports on the types of files uploaded and downloaded in your community.	File and Content Report	~
C - File Activity L90D	Reports on the number of uploads and downloads in your community in the last 90 days.		~
C - File Sharing Monthly	Monthly trending report on the number of file shares in your community.	File and Content Report	
C - File Uploads Distribution By Type	Distribution of files uploaded by file type.	File and Content Report	~
C - New Files Trending By Contributions	Files uploaded in the last 30 days with the most posts and comments.	File and Content Report	
C - New Files Trending By Downloads	Files uploaded in the last 30 days with the most downloads.	File and Content Report	
C - New Files Trending By Likes	Files uploaded in the last 30 days with the most likes.	File and Content Report	
C - Top 10 Users - Most File Contrib L30D	Top 10 users who received the largest number of posts and comments on their files in the last 30 days.	File and Content Report	
	Note: This report is not included on the Content dashboard. If you want to use it, edit the dashboard and remove an existing report to add it.		
C - Top 10 Users - Most File Likes L30D	Top 10 users who received the largest number of likes on their files in the last 30 days.	File and Content Report	
	Note: This report is not included on the Content dashboard. If you want to use it, edit the dashboard and remove an existing report to add it.		
C - Top 10 Users - Most File Uploads	Top 10 users who uploaded the largest number of files.	File and Content Report	

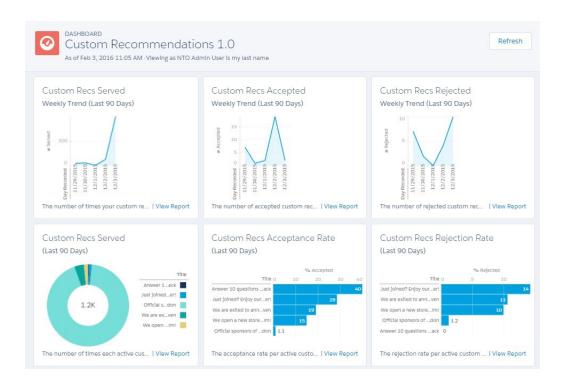
# Custom Recommendations Dashboard and Reports

Use the Custom Recommendations dashboard to see how your community's custom recommendations are doing.

You can see how often your recommendations are viewed, clicked, or dismissed. You can view data for individual recommendations or across channels.

- Which recommendations are being clicked the most?
- Which recommendations are being rejected the most?
- Are my custom channels helping my recommendations?

**Προταπ:** This dashboard and its reports are *only* available in the package with Chatter.



### IN THIS SECTION:

#### Recommendations FAO

Frequently asked questions about recommendations.

### Recommendations FAQ

Frequently asked questions about recommendations.

What does it mean when a recommendation is served?

A recommendation is served when it's displayed on a page, including when the page refreshes.

What does it mean when a recommendation is accepted?

A recommendation is accepted when a member clicks the button text, such as "Buy Now."

What does it mean when a recommendation is rejected?

A recommendation is rejected when a member clicks "I'm not interested."

*How is the acceptance rate calculated?* 

The acceptance rate equals the total number of times a member clicks the recommendation, divided by the total number times the recommendation was served (displayed) in your community. For example, if a custom recommendation is clicked by 100 members and it was served 1,000 times, the acceptance rate is 10%.

How is the rejection rate calculated?

The rejection rate equals the total number of times a member dismisses the recommendation, divided by the total number of times the recommendation was served (displayed) in your community. For example, if a custom recommendation is dismissed 100 times and it was served 1,000 times, the rejection rate is 10%.

What are channels?

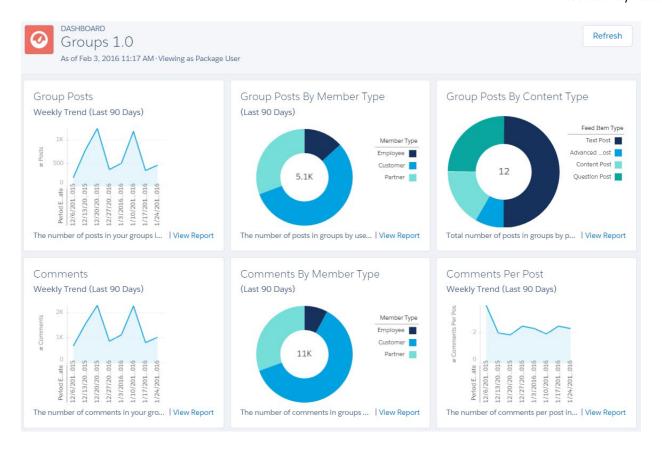
Channels group recommendations together so you can determine where they show up in your community.

Report Name	Description	Custom Report Type	On Dashboard?
R - Channel Recommendations Details	Details for your custom recommendation channels. This includes information about your channels being served the most, accepted the most, or rejected the most.	Network Custom Recommendations 1.0	~
R - Channel Recommendations L90D	Custom recommendation channel trends by acceptance rate, rejection rate, and number of times it was served (displayed) in the last 90 days.	Network Custom Recommendations 1.0	~
R - Custom Recommendations Details	Details for your custom recommendations. This includes information about your recommendations being served the most, accepted the most, or rejected the most.	Network Custom Recommendations 1.0	~
R - Custom Recommendations L90D	Top custom recommendations over time. This includes details about how many of your custom recommendations were served, accepted (clicked), or rejected (dismissed) in the last 90 days.	Recommendations	~

## **Groups Dashboard and Reports**

Use the Groups dashboard to monitor feed and member activity in Chatter groups.

- Which groups are most active?
- Which groups are growing the fastest?
- Who are the top contributors?
- How many posts and comments are there in groups?
- **(1) Important**: This dashboard and its reports are *only* available in the package with Chatter.



Report Name	Description	Custom Report Type	On Dashboard?
G - # Group Comments	Total number of comments in active groups.	Network Group Activity 3.0	
G - # Group Comments L30D	Total number of comments in active groups, in the last 30 days.	Network Group Activity 3.0	
G - # Group Comments Per Post	Total number of comments per post in groups, in the last 30 days.	Network Activity Daily Metrics 2.0	
G - # Group Comments Per Post L30D	Total number of comments per post in groups.	Network Activity Daily Metrics 2.0	
G - # Group Members	Total number of active members across all non-archived groups.	Network Group Members 2.0	
G - # Group Members Added L30D	Total number of active members added in the last 30 days across all non-archived groups.	Network Group Members 2.0	
G - # Group Posts	Total number of posts in active groups.	Network Group Activity 3.0	
G - # Group Posts L30D	Total number of posts in active groups, in the last 30 days.	Network Group Activity 3.0	

Report Name	Description	Custom Report Type	On Dashboard?
G - # Groups	Total number of groups.	Network Group Membership 2.0	
G - # Groups Added L30D	Total number of active groups created in the last 30 days.	Network Group Membership 2.0	
G - Active Groups L90D	Reports on groups with activity, such as posts and comments, in the last 90 days.	Network Group Activity 3.0	~
G - Group Activity L90D	Trend on the number of posts and comments in your groups in the last 90 days.	Network Activity Daily Metrics 2.0	~
G - Group Activity By User Type L90D	Reports on the number of contributions in groups by user type, such as partner, customer, or employee in the last 90 days.	Network Activity Daily Metrics 2.0	<b>▽</b>
G - Top 10 Groups By Contributions	Top groups by contributions.	Network Group Activity 3.0	~
G - Top 10 Groups By Members	Top groups by members. Excludes members of archived groups and inactive users.	Network Group Activity 3.0	~
Group Posts By Type	Posts in groups by post type.	Network Group Activity 3.0	~

## Members Dashboard and Reports

Use the Members dashboard to track community membership, new members added, and external member logins over time.

- How many members are there and how many are new?
- Which members are logging in the most?
- Which new members are logging in the most?
- 1 Tip: If your community is not using the reputation feature, you can remove the reports and metrics associated with the feature.
- (1) Important: For information about the reports provided in the Members dashboard for the package without Chatter, refer to what's installed in your org.



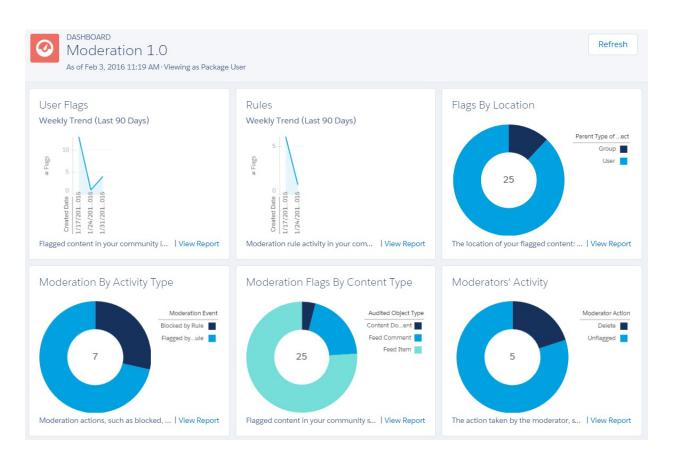
Report Name	Description	Custom Report Type	On Dashboard?
M - # Member Logins L30D	Total number of members who logged in during the last 30 days.	Network Login History 5.0	
M - # Members	Total number of active members.	Network Members 2.0	
M - # Members Added L30D	Total number of active members added to the community in the last 30 days.	Network Members 2.0	
M - Members By Reputation Level	Total number of members by reputation level. To use this report, you must update the Reputation Level field and map it to your reputation levels and points.	Network Members 2.0	~
M - Members With No Profile Photo	Reports on members without a user profile photo.	Network Members 2.0	~
M - Top 10 Members By Reputation Points	Top 10 members with the highest reputation points.	Network Members 2.0	~
Members by Type	Total number of members by type.	Network Members 2.0	~

Report Name	Description	Custom Report Type	On Dashboard?
New Members (Last 90 Days Trend)	New members in the last 90 days.	Network Membership Daily Metrics 2.0	<b>~</b>
O - External Logins L90D	External logins by community member type in the last 90 days.	Network Membership Daily Metrics 2.0	<b>▽</b>

## Moderation Dashboard and Reports

Use the Moderation dashboard to track community moderators' and members' flagging activity.

- How many flags are there?
- Who is flagging content?
- Who is removing flags?
- How many private messages are being sent?
- (1) Important: This dashboard and its reports are only available in the package with Chatter.



Report Name	Description	Custom Report Type	On Dashboard?
MO - # Flagged Items Deleted	Total number of flagged items deleted by moderators.	Network Moderation 2.0	
MO - # Flags	Total number of flagged items.	Network Moderation 2.0	
MO - # Flags L30D	Total number of flagged items in the last 30 days.	Network Moderation 2.0	
MO - # Flags Removed	Total number of flags removed by moderators or users unflagging content.	Network Moderation 2.0	
MO - # Messages Sent	Total number of private messages sent in the community.	Network Private Messages 2.0	
MO - # Messages Sent L30D	Total number of private messages sent in the last 30 days in the community	Network Private Messages 2.0	
MO - Flags L90D	Trending report of flagged content in your community in the last 90 days.	Network Moderation 2.0	~
MO - Flagged Item Location	Reports on the location of your flagged content, in user profiles or in groups.	Network Moderation 2.0	~
MO - Flagged Item Type	Flagged content in your community sorted by object type, such as files, posts, comments, and private messages.	Network Moderation 2.0	~
MO - Moderator Action	Reports on the action taken by the moderator, such as removing the flag on a post or deleting the flagged post.	Network Moderation 2.0	~
MO - Rule Action	Reports on moderation actions, such as blocked, flagged, or replace.	Network Moderation 2.0	<u>~</u>
MO - Rule Activity L90D	Trending report on moderation rule activity in your community in the last 90 days.	Network Moderation 2.0	<u>~</u>
MO - Top 10 Message Senders L30D	Top 10 members sending the most private messages in the last 30 days.	Network Private Messages 2.0	

# **Q&A Dashboard and Reports**

Use the Q & A dashboard to track recent activity for questions, answers, and best answers posted in groups

To track the same activity in user profiles, use the Self-Service Dashboard. With this dashboard you can answer:

- How many questions and answers are there per month?
- How many unanswered questions are there?
- How many questions without best answers are there?
- Who are the top question creators and question responders?

- How are questions and answers trending?
- **(1) Important**: This dashboard and its reports are *only* available in the package with Chatter.



Report Name	Description	Custom Report Type	On Dashboard?
Q - # Answers in Groups	Total number of answers in groups.	Network Group Activity 2.0	
Q - # Answers in Groups L30D	Total number of answers in groups in the last 30 days.	Network Group Activity 2.0	
Q - # Best Answers in Groups	Total number of best answers in groups.	Network Group Activity 2.0	
Q - # Questions in Groups	Total number of questions posted in groups.	Network Group Activity 2.0	
Q - # Questions in Groups L30D	Total number of questions posted in groups in the last 30 days.	Network Group Activity 2.0	
Q - # Unanswered Questions in Groups	Total number of unanswered questions in groups.	Network Group Activity 2.0	

Report Name	Description	Custom Report Type	On Dashboard?
Q - % Of Qs With Best Answers in Groups	Percentage of answered questions that have best answers in groups.	Network Group Activity 2.0	
Q - Answered Questions Groups L90D	Answered questions in groups in the last 90 days.	Network Group Activity 2.0	~
Q - Answers in Groups L90D	Trend of answers in groups in the last 90 days.	Network Activity Daily Metrics 2.0	~
Q - Best Answers in Groups L90D	Trend of best answers in groups in the last 90 days.	Network Activity Daily Metrics 2.0	~
Q - Questions in Groups L90D	Trend of questions in groups in the last 90 days.	Network Activity Daily Metrics 2.0	~
Q - Top 10 Best Q Responders in Groups	Top 10 users responding to questions with the best answers.	Network Group Activity 2.0	~
Q - Top 10 Question Creators in Groups	Top 10 users with the most questions	Network Group Activity 2.0	~
Q - Top 10 Question Responders in Groups	Top 10 users responding to questions	Network Group Activity 2.0	~
Q - Unanswered Questions Groups L90D	Unanswered questions in groups in the last 90 days.	Network Group Activity 2.0	<b>✓</b>

## Self-Service Dashboard and Reports

The Self-Service dashboard tracks activity in the self-service template.

You can track recent activity for questions and answers posted on user profiles. To track the same activity in groups, use the Q&A Dashboard and Reports. With this dashboard you can answer:

- How many questions, unanswered questions, and answers there are in users profiles?
- How many daily page views and unauthenticated unique visitors does my community have?
- Who is creating and responding to questions?
- **(1) Important**: This dashboard and its reports are *only* available in the package with Chatter.



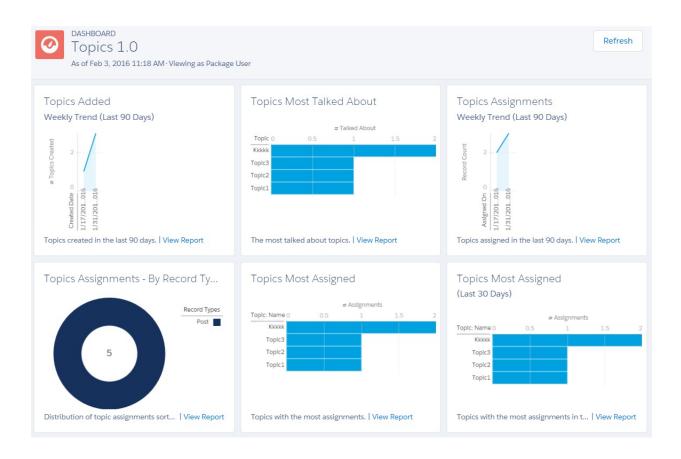
Report Name	Description	Custom Report Type	On Dashboard?
S - # Answers in User Profiles	Total number of answers in user profiles.	Network User Activity 2.0	
S - # Answers in User Profiles L30D	Total number of answers in the last 30 days in user profiles.	Network User Activity 2.0	
S - # Average Page Views per UV	Average number of page views per unique visitor.	Network Public Usage Daily Metrics 2.0	
S - # Best Answers in User Profiles	Total number of best answers in user profiles.	Network User Activity 2.0	
S - # Page Views L30D	Total number of page views in the last 30 days.	Network Public Usage Daily Metrics 2.0	
S - # Questions in User Profiles	Total number of questions posted in user profiles.	Network User Activity 2.0	
S - # Questions in User Profiles L30D	Total number of questions posted in the last 30 days in user profiles.	Network User Activity 2.0	

Report Name	Description	Custom Report Type	On Dashboard?
S - # Unanswered Qs in User Profiles	Total number of unanswered questions in user profiles.	Network User Activity 2.0	
S - % Of Qs With Best Answer User Profile	Percentage of answered questions that have best answers in user profiles.	Network User Activity 2.0	
S - Answers By User Type L90D	Answers in the last 90 days grouped by user type, such as partner, customer, or employee.	Network Activity Daily Metrics 2.0	~
S - Answers in User Profiles L90D	Answers in the last 90 days.	Network Activity Daily Metrics 2.0	~
S - Avg Page Views By Visitors L90D	Reports on the average page views generated by visitors for the last 90 days.	Network Public Usage Daily Metrics 2.0	<b>✓</b>
S - Best Answers By User Type L90D	Best answers in the last 90 days grouped by user type, such as partner, customer, or employee.	Network Activity Daily Metrics 2.0	~
S - Best Answers in User Profiles L90D	Best answers in the last 90 days.	Network Activity Daily Metrics 2.0	~
S - Page Views L90D	Reports on the number of page views generated by guest users for the last 90 days in your self-service community.  Note: The number of page views might not match other analytics tools, as all tools use different methods for counting page views.	Network Public Usage Daily Metrics 2.0	✓
S - Questions By User Type L90D	Questions in the last 90 days grouped by user type, such as partner, customer, or employee.	Network Activity Daily Metrics 2.0	~
S - Questions in User Profiles L90D	Questions in the last 90 days.	Network Activity Daily Metrics 2.0	~
S - Top 10 Best Q Respd in User Profiles	Top 10 users responding to questions with the best answer.	Network User Activity 2.0	
S - Top 10 Q Creators in User Profiles	Top 10 users with the most questions.	Network User Activity 2.0	
S - Top 10 Q Responders in User Profiles	Top 10 users responding to questions.	Network User Activity 2.0	
S - Unique Visitors L90D	Reports on unauthenticated unique visitors, who visited the site at least once that week, in the last 90 days in your self-service community. This includes visitors accessing the login and logout pages.	Network Public Usage Daily Metrics 2.0	✓

## Topics Dashboard and Reports

Use the Topics dashboard to track your community topics.

- How are topics trending?
- How many topics are getting assigned?
- Who's assigning topics?
- Which topics are being talked about?
- (1) Important: This dashboard and its reports are only available in the package with Chatter.



Report Name	Description	Custom Report On Dashboard? Type
T - # Topics	Total number of topics.	Network Topics 2.0
T - # Topics Added L30D	Total number of topics added in the last 30 days.	Network Topics 2.0
T - # Topics Assigned	Total number of topics assigned.	Network Topic Assignments 3.0
T - # Topics Assigned L30D	Total number of topics assigned in the last 30 days.	Network Topic Assignments 3.0

Report Name	Description	Custom Report Type	On Dashboard?
T - Top 10 Topic Assigners	Top 10 users with the largest number of topics assigned.	Network Topic Assignments 3.0	~
T - Top 10 Topic Assigners L30D	Top 10 users with the largest number of topics assigned in the last 30 days.	Network Topic Assignments 3.0	~
T - Top 10 Topics By Assignment	Top 10 topics with the most assignments.	Network Topic Assignments 3.0	~
T - Top 10 Topics By Assignment L30D	Top 10 topics with the most assignments in the last 30 days.	Network Topic Assignments 3.0	~
T - Top 10 Trending Topics	Top 10 topics with the largest number of "Talking About" indicators.	Network Topics 2.0	~
T - Topics Assignments By Record Type	Distribution of topic assignments sorted by the Record Types field (unmapped record types show as Other).	Network Topic Assignments 3.0	~
	Note: You can create values for the Record Types field to map custom objects or other types that are not predefined.		
T - Topics Assigned L90D	Reports on the number of topics assigned in the last 90 days.	Network Topic Assignments 3.0	~
T - Topics Created L90D	Trending report on the number of topics created in the last 90 days.	Network Topics 2.0	<b>✓</b>

## Misc Communities Reports

The reports provided in this folder are feature-dependent or require special user permissions. You can add these reports to Insights folders or dashboards in Community Management or Community Workspaces. These reports are provided in the **Misc Communities Reports** folder.

Report Name	Description	Requires	Custom Report Type
	Total number of questions that escalated to cases in the last 30 days.	Org preference - Enable Question-to-Case in Communities	Network Cases 1.0
	? Tip: You can use this report on your Home Dashboards.	Communities	
Escalated To Case	Questions that have been escalated to cases.	Org preference - Enable Question-to-Case in	Network Cases 1.0
	Tip: We recommend that you add this report to the <b>Insights Self-Service</b> folder so you can view this report in Community Management or Community Workspaces.	Communities	

Report Name	Description	Requires	Custom Report Type
Escalated To Case Closed	Questions that have been escalated to cases and closed in the last 7 days.	Org preference - Enable Question-to-Case in Communities	Network Cases 1.0
	? Tip: We recommend that you add this report to the <b>Insights Self-Service</b> folder so you can view this report in Community Management or Community Workspaces.	Communities	
Messages From New Members	Private messages sent by external users in the last 7 days.	Org preference -	Network Private Messages 3.0
Welliders	This report only includes messages sent by external users who registered in the last 7 days.	Enable Private Messages	messages s.s
	Tip: We recommend that you add this report to	User permission - "Manage Chatter Messages"	
	the <b>Moderation Audit Trail</b> folder so you can view this report in Community Management or Community Workspaces.	(!) Important: You need this user permission to see the report in your org.	
Questions Escalated - Monthly Trend	Monthly trending report on questions escalated to cases in your community.	Org preference - Enable Question-to-Case in Communities	Network Cases 1.0
	Tip: You can use this report on your Community Management Home dashboard or in Community Workspacesunder <b>Dashboards</b> > <b>Home</b> .		
Questions Escalated - Weekly Trend	Weekly trending report on the number of questions escalated to cases in your community in the last 90 days.	Org preference - Enable Question-to-Case in Communities	Network Cases 1.0
	Tip: You can use this report on your Community Management Home dashboard or in Community Workspaces under <b>Dashboards</b> > <b>Home</b> .		
→ Related Questions CTR	The click-through rate for the Related Questions (RQ) widget, which is the ratio of the number of times a user clicked on the RQ widget compared to the number of times the widget was shown	Related Questions CTR 1.0	

## Salesforce Org Dashboard and Report Descriptions

You must view the Chatter and Licenses dashboards and reports from your internal Salesforce org.

#### IN THIS SECTION:

#### Chatter Dashboard and Report

Use the Chatter dashboards and reports to track Chatter usage in your internal Salesforce org.

#### License Usage Dashboard and Reports

Use the Licenses Usage 1.0 dashboard to track usage of login-based and named-user licenses so you can optimize license usage and plan for growth.

## **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

## Chatter Dashboard and Report

Use the Chatter dashboards and reports to track Chatter usage in your internal Salesforce org.

### **Internal Salesforce Org**

You must view these dashboards and reports from your internal Salesforce org. If you previously installed the Salesforce Chatter Dashboards package, you must uninstall that package and use the reports and dashboards provided here instead. You can find these reports and dashboards in the **Chatter Reports** and **Chatter Dashboards** folders.

**(1) Important**: These dashboard and reports are *only* available in the package with Chatter.



## **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

For detailed information about the Chatter dashboards, reports, and custom report types, see Get Started with Chatter Dashboards. The following components are provided in the Chatter Dashboards package:

- Chatter Overview dashboard and reports
- Chatter Adoption by Department dashboard and reports
- Chatter Files dashboard and reports

Name less than! filter.

- Chatter Groups dashboard and reports
- Chatter Management dashboard and reports
- Chatter Q&A dashboard and reports
- Chatter Topics dashboard and reports
- Chatter User dashboard and reports
- Chatter Custom Report Types
- Chatter Edits reports

# License Usage Dashboard and Reports

Use the Licenses Usage 1.0 dashboard to track usage of login-based and named-user licenses so you can optimize license usage and plan for growth.

With this dashboard, you can see:

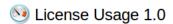
- If you need to adjust your allocated license usage
- Monthly and daily tracking of your license usage
- Predict and stop possible overages based on monthly trends

The reports in this dashboard only track community licenses. To track portal licenses, clone the reports and update the license filter.

You can find these reports and dashboards in the Communities Reports and Communities Dashboards folders.

(1) Important: View this dashboard only from your internal Salesforce org's Dashboards tab. Viewing this dashboard in Community Management or Community Workspaces displays incorrect data as the license metrics become community- specific and not org-wide. For this reason, we recommend that you don't map this dashboard in Community Management or Community Workspaces

Edit | Clone | Refresh | As of Today at 5:35 AM



Q. Find a dashboard.

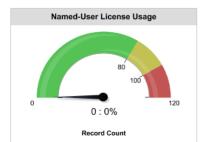
# Licenses Purchased::



0

## Customer Community Members

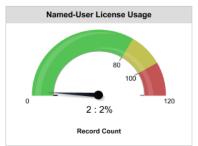
The number of Customer Community member-based licenses you've purchased.



Customer Community license usage. TIP: Adjust this report's gauge thresholds. Replace 100 with the value listed for the # User Licenses Allocated and then adjust your 80% and 120% limits.

#### Customer Community Plus Members

# Licenses Purchased:: 500
The number of Customer Community Plus member-based licenses you've purchased.



Customer Community Plus license usage. TIP: Adjust this report's gauge thresholds. Replace 100 with the value listed for the # User Licenses Allocated and then adjust your 80% and 120% limits.

### Partner Community Members

# Licenses Purchased:: **2K**The number of Partner Community member-based licenses you've purchased.



Partner Community license usage. TIP: Adjust this report's gauge thresholds. Replace 100 with the value listed for the # User Licenses Allocated and then adjust your 80% and 120% limits.

#### **Customer Community Logins**

# Monthly Logins Purchased: 0
The number of Customer Community monthly logins you've purchased.



The current month's usage of logins across all communities. TIP: Adjust this report's gauge thresholds. Replace 100 with the value listed for the # Monthly Logins Allocated and then adjust your 80% and 120% limits.

#### **Customer Community Plus Logins**

# Monthly Logins Purchased: **0**The number of Customer Community Plus monthly logins you've purchased.



The current month's usage of logins across all communities. TIP: Adjust this report's gauge thresholds. Replace 100 with the value listed for the # Monthly Logins Allocated and then adjust your 80% and 120% limits.

#### **Partner Community Logins**

# Monthly Logins Purchased: **0**The number of Partner Community monthly logins you've purchased.



communities. TIP: Adjust this report's gauge thresholds. Replace 100 with the value listed for the # Monthly Logins Allocated and then adjust your 80% and 120% limits.



Note: Customize gauge reports to provide relevant ranges based on your actual number of licenses. To edit the dashboard click Edit Attributes on the report you want to customize. For Breakpoint 2 (set by default to 100), enter your number of allocated licenses. For Breakpoint 1 (set by default to 80), enter 80% of your allocated licenses. For Maximum (set by default to 120), enter 120% of your allocated licenses. You can also change the breakpoints to any percentage you want. For example, if you have 50 licenses, you would change 80 to 40, 100 to 50, and 120 to 60.



Report Name	Description	Custom Report Type	Package with Chatter	Package without Chatter
L - CC Login-based - Monthly Logins 2.0	Monthly number of logins for users with a Customer Community login-based license in descending order.	9	<b>~</b>	<u>~</u>
L - CC User-based - Monthly Logins 2.0	Monthly number of logins for users with a Customer Community user-based license in descending order.	9	<b>~</b>	<u>~</u>
L - # Cust Comm All Active Lic 2.0	Number of active members on a Customer Community license across all communities.	Network Login History 5.0	~	~
L - # Cust Comm All Allocated Lic 2.0	Number of Customer Community licenses allocated in this Salesforce org across all communities.	Network Login History 5.0	~	~
L - # Cust Comm Login Members	Number of users created with the Customer Community login-based license. (The Network Tenant Usage Entitlement custom report type is no longer supported in this package. Use the Cust Comm Login Members report to get a detailed report of usage)	Network Login History 5.0	▼	✓
L - # Cust Comm Logins All Alloct 2.0	Number of monthly logins allocated for the Customer Community login-based license in this Salesforce org across all communities.	Network Login History 5.0	~	<b>~</b>
L - CCP Login-based - Monthly Logins 1.0	Monthly number of logins for user with a Customer Community Plus user-based license in descending order.	Network Login History 5.0	~	<b>~</b>
L - CCP User-based - Monthly Logins 2.0	Monthly number of logins for users with a Customer Community Plus user-based license in descending order.	Network Login History 5.0	~	<b>~</b>
L - # Cust Comm Plus All Active Lic	Number of active members on a Customer Community Plus license across all communities.	Network Login History 5.0	<b>~</b>	~

Report Name	Description	Custom Report Type	Package with Chatter	Package without Chatter
L - # Cust Comm Plus All Alloct Lic 2.0	Number of Customer Community Plus licenses allocated in this Salesforce org across all communities.	Network Login History 5.0	<u>~</u>	~
L - # Cust Comm Plus Login Members	Number of users created with the Customer Community Plus login-based license.	Network Login History 5.0	<b>✓</b>	~
L - # Cust Comm Plus Logins All Alloct 2.0	Number of monthly logins allocated for the Customer Community Plus login-based license in this Salesforce org across all communities.		<u>~</u>	~
L - # Partner Comm All Active Lic	Number of active members on a Partner Community license across all communities.	Network Login History 5.0	<b>✓</b>	~
L - # Partner Comm All Allocated Lic 2.0	Number of Partner Community licenses allocated in this Salesforce org across all communities.	Network Login History 5.0	<u>~</u>	~
L - # Partner Comm Logins All Alloct 2.0	Number of monthly logins allocated for the Partner Community login-based license in this Salesforce org across all communities.	Network Login History 5.0	~	~
L - # Partner Comm Login Members	Number of users created with the Partner Community login-based license.	Network Login History 5.0	<u>~</u>	~
L - Cust Comm License Usage	Customer Community user license usage across all communities. This report counts the number of users created with a Customer Community license.	Network Login History 5.0	~	~
L - Cust Comm Login Monthly Trend 2.0	Monthly trend of Customer Community logins compared to your allocation.	Network Login History 5.0	~	~
L - Cust Comm Login Monthly Usage 2.0	The current month's usage of Customer Community logins compared to your monthly allocation.  Important: To use this report, you must specify your license limits.	Network Login History 5.0	<b>▽</b>	✓
L - Cust Comm Plus License Usage	Customer Community Plus user license usage across all communities. This report counts the number of users created with a Customer Community Plus license.  [] Important: To use this report, you must	Network Login History 5.0	✓	~
	specify your license limits.			
L - Cust Comm Plus Login Monthly Trend 2.0	Monthly trend of Customer Community Plus logins compared to your allocation.	Network Login History 5.0	~	~

Report Name	Description	Custom Report Type	Package with Chatter	Package without Chatter
L - Cust Comm Plus Login Monthly Usage 2.0	The current month's usage of Customer Community Plus logins compared to your monthly allocation.	Network Login History 5.0	~	~
	!mportant: To use this report, you must specify your license limits.			
L - Member Distribution By License Type	The distribution of members by license type: member-based or login-based.	Network Login History 5.0	<b>~</b>	~
L - Partner Comm License Usage	Partner Community user license usage across all communities. This report counts the number of users created with a Partner Community license.	Network Login History 5.0	<b>~</b>	<b>✓</b>
	Important: To use this report, you must specify your license limits.			
L - Partner Comm Login Monthly Trend 2.0	Monthly trend of Partner Community logins compared to your allocation.	Network Login History 5.0	~	~
L - Partner Comm Login Monthly Usage 2.0	The current month's usage of Partner Community logins compared to your monthly allocation.	Network Login History 5.0	~	~
	Important: To use this report, you must specify your license limits.			
L - PC Login-based - Monthly Logins 1.0	Monthly number of logins for users with a Partner Community login-based license in descending order.	Network Login History 5.0	~	~
L - PC User-based - Monthly Logins 1.0	Monthly number of logins for users with a partner Community user-based license in descending order.	Network Login History 5.0	<b>~</b>	~
<ul><li>◆ L - Public Page Views</li><li>- Monthly Trend</li></ul>	Monthly trending report on the daily page views generated by guest users in your community.	Network Login History 5.0	✓	~
L - Yearly Public Page Views	Yearly report on the daily page views generated by guest users in your community.	Network Login History 5.0	~	~

# **Custom Report Type Descriptions**

The reports in this package are based on a set of communities-focused custom report types, which you can customize to enhance reporting capabilities with more fields.



Tip: Items in custom report types that reference a user or member, such as Created By, contain the following user lookup fields: LastLoginDate, Department, Country, Role, and Profile. You can specify these additional fields to display in your report by editing the custom report type from Setup. Open the custom report type details, click **Edit Layout**, and then click **Add fields related via lookup**.

The Network Members object includes member lookup fields. With access to this detail, you can repurpose member reports to report on other things such as accounts. For example, you can make a copy of a member report and then add the User. Account field through the Network Members

## **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

lookup fields. This approach allows you to use the Top 10 Members By Contribution report to create a new report called Top 10 Accounts by Contributor report. You can customize reports to provide data on the top active and inactive accounts based on the number of logins over a specific time range.





**Note:** Currently, you can't report on the number of accounts by type. Also, the following custom report types don't track internal users who log in to a community from their internal Salesforce org.

Custom Report Type Name	Description	Package with Chatter	Package without Chatter
Chatter Activity 1.0	Provides information on Chatter user activity such as, posts, comments, and likes. The user metrics are calculated against the user activity on groups and user profiles in your organization.	<b>✓</b>	
Chatter Activity Daily Metrics 1.0	Provides daily trending metrics on posts and comments created in groups and user profiles in your organization.	~	
Chatter Edits 1.0	Provides information on Chatter edits.	~	
Chatter Group Members 1.0	Provides information on groups and their members, such as the date a member joined the group.	~	

Custom Report Type Name	Description	Package with Chatter	Package without Chatter
Chatter Groups Activity 1.0	Provides information on group activity, such as posts, comments, and likes, and group contributors. Use this custom report type to report on overall group activity, by member type and by feed item type (for example: post or question poll).	<b>✓</b>	
Chatter Knowledgeable Users 1.0	Provides information on knowledgeable users in your organization.	~	
Chatter Topic Assignments 1.0	Provides information on topic assignments. Use this custom report type to report on the number of assignments, your top assigners, and assignments by object types. You can also use it to find topics with the most assignments.	~	
Chatter Topics 1.0	Provides information on trending topics, topic assigners, and more.	<b>~</b>	
Chatter Unique Contributor Daily Metrics 1.0	Provides information on daily unique visitors across groups and user profiles in your organization.	<u>~</u>	
Chatter User Activity 1.0	Provides information on user profiles such as posts, comments, and likes, and profile contributors. Use this custom report type to report on overall user profile activity, by member type and by feed item type (for example, post or question poll).	✓	
<ul><li>Community Searches 2.0</li></ul>	Provides information about community's search behavior.	<u>~</u>	~
File and Content Report	Use this standard report type to track file adoption and engagement for Chatter in your internal Salesforce org or in communities. You can also track file properties (such as file version and size), file uploads, downloads, shares, links, link views, and who uploaded the content.	<u>~</u>	
Network Activity Audit 1.0	Provides information about flagging and moderation activity in a community.	~	
Network Activity Daily Metrics 2.0	Provides daily trending metrics on posts and comments created in groups and user profiles by member type (internal, customer, and partner).	<b>▽</b>	
Network Cases 1.0	Provides information about cases in your Salesforce org.	<b>✓</b>	
Network Chatter Edits 1.0	Provides information on Chatter edits in the community.	✓	
Network Comments Pending Approval 1.0	Provides information about your community's feed comments that are pending approval.	~	
Network Custom Recommendations 1.0	Provides information about the custom recommendations and channels in your community including; details about the acceptance rate, rejection rate, and number of times a recommendation was served.	<u>~</u>	<b>▽</b>

Custom Report Type Name	Description	Package with Chatter	Package without Chatter
Network Group Membership 3.0	Provides information on groups and their members, such as the date a member joined the group and the member type (internal, customer, or partner).	~	
Network Groups Activity 3.0	Provides information on group activity (posts, comments, and likes) and group contributors. Use this custom report type to report on overall group activity, by member type and by feed item type (for example: post or question poll).	<b>▽</b>	
Network Groups Q & A Activity 1.0	Provides information about your community groups' question and answer activities.	<b>✓</b>	
Network Login History 5.0	Provides detailed metrics about the external users (partners or customers) logging into a community. This custom report type doesn't include logins for internal users accessing the community from their internal Salesforce org. (The Network Tenant Usage Entitlement custom report type is no longer supported in this package. Lookup Network > Network Members > Login History from the Network Login History 5.0 custom report type to get a detailed report of usage)	<b>✓</b>	<b>✓</b>
Network Member Activity 1.0	Provides high-level metrics about community member adoption and engagement.	<b>✓</b>	
Network Members 3.0	Provides information on community members. The Network Members entity exposes all user record fields.	<b>✓</b>	~
Network Membership Daily Metrics 2.0	Provides daily trending metrics for all members including new members in the community, across all member types (internal, partner, and customer). Also provides daily trending metrics on external (partner and customer) member logins.	<b>▽</b>	✓
Network Frozen Members 2.0	Provides information about all your community's frozen members.	<b>✓</b>	
<ul> <li>Network Moderation</li> <li>Flagged Direct Messages 1.0</li> </ul>	Provides information about all of your community's direct messages which have been flagged by the users.	~	
Network Moderation Flagged Comments 2.0	Provides information about all your community's feed comments which are flagged by the users.	<b>✓</b>	
Network Moderation Flagged Files 2.0	Provides information about all your community's files which are flagged by the users.	<b>✓</b>	
Network Moderation Flagged Messages 2.0	Provides information about all your community's Chatter messages which are flagged by the users.	<b>✓</b>	
Note: This report has been enhanced for this version			

Custom Report Type Name	Description	Package with Chatter	Package without Chatter
Network Moderation Flagged Posts 2.0	Provides information about all your community's feed posts which are flagged by the users.	~	
Network Posts Pending Approval 2.0	Provides information about all your community's feeds posts which are pending approval.	<b>✓</b>	
Network Private Messages 3.0	Provides information on private messages sent in a community, including who sent them.	<b>✓</b>	
Network Public Usage Daily Metrics 2.0	Provides daily trending metrics on the number of public page views (such as guest user access). Force.com and Site.com page views are tracked. You can also use this custom report type to track page views on a community template such as Napili.	<b>▽</b>	<b>▽</b>
Network Topic Assignments 3.0	Provides information on topic assignments in a community. Use this custom report type to report on the number of assignments, your top assigners, and assignments by object types. You can also use it to find topics with the most assignments.	<b>~</b>	
Network Topics 3.0	Provides information on trending topics, topic assignments, topic assigners, and more.	<b>✓</b>	
Network Unique Contributor Daily Metrics 2.0	Provides information on daily unique visitors across groups and user profiles, by member type (internal, customer, and partner).	~	
Network User Activity 3.0	Provides information on user profile activity (such as posts, comments, and likes) and profile contributors. Use this custom report type to report on overall user profile activity, by member type and by feed item type (for example, post or question poll).	<b>✓</b>	
Network User Licenses 1.0	Provides information about community user license usage.	~	~
	The Usage Entitlement is a license bucket that includes Customer Community Logins, Customer Community Members, Partner Community Logins, and Partner Community Members (tracking both community and portal licenses assigned to the community). The Customer Community Members and Partner Community Members bucket fields track name-based users per community. The Customer Community Logins and Partner Community Logins bucket fields track login-based users across communities.		
	The Amount Used field indicates how many licenses were used that week. The Amount Allowed field indicates how many licenses the customer purchased (either named-users or logins per month).		

Custom Report Type Name	Description	Package with Chatter	Package without Chatter
Related Questions CTR 1.0	Provides information about the number of times a user clicks on the Related Questions widget compared to the number of times it is shown.		

## The Power of Customization

The dashboard and reports provided in the package are a great start, but they may not be exactly what your community needs. With a few simple steps, you can customize the provided dashboards and reports to suit your needs. To customize a report, open the **Reports** tab and click the report name you want to modify, then click **Customize**.

#### IN THIS SECTION:

#### Customize the Date Filter

For reports that specify a date filter, you can customize these reports to provide any date range.

#### Add or Remove Columns from Reports

If a report includes a column that isn't useful to you, remove it. If you want more data displayed, add another column. To add a column, double-click the additional field from the Fields pane, and reorder the columns if you want to. To remove a column, click the column and select **Remove Column**.

#### Change the Grouping of a Report

You can change the report grouping to better fit your community or internal Salesforce org.

#### Add More Filter Logic

You can add more filters to a report. For example, you can filter a report to only show external users or a subset of groups.

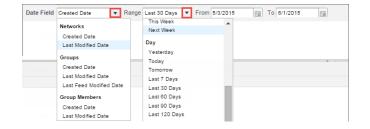
#### Report on New Data

You can also report on new data by adding custom lookup fields to the custom report types.

### Customize the Date Filter

For reports that specify a date filter, you can customize these reports to provide any date range.

You can also change the **Date Field** to report on other objects in the report. Try customizing the G- # Group Members Added L30D report.



# **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

# EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

For more information, see Filter Your Report Data, Build Effective Filters, and Understanding Relative Date Values for Filter Criteria.

## Add or Remove Columns from Reports

If a report includes a column that isn't useful to you, remove it. If you want more data displayed, add another column. To add a column, double-click the additional field from the Fields pane, and reorder the columns if you want to. To remove a column, click the column and select **Remove Column**.



For more information, see Report Fields in Salesforce Help.

# EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

## Change the Grouping of a Report

You can change the report grouping to better fit your community or internal Salesforce org. For example, if a report is grouped by department, you can group by country instead. Try customizing the CH D - Group Membership By Dept report.

- 1. In the Fields pane, drag the new field you want to group by into the Preview pane area that says **Drop a field here to create a grouping**.
- 2. In the Preview pane, click the old grouping field and select **Remove Group**.
- **3.** On your new grouping field, click the dropdown and select **Sort Group By** and select the relevant data you want to sort by.

For more information, see Group Your Report Data.

## EDITIONS

Available in: Salesforce Classic and Lightning Experience

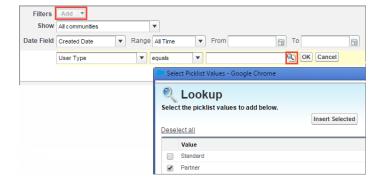
Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

### Add More Filter Logic

You can add more filters to a report. For example, you can filter a report to only show external users or a subset of groups.

To add a filter, click **Add** and then specify the field.

Adding a User Type filter:

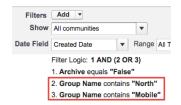


Added Group filter:

# EDITIONS

Available in: Salesforce Classic and Lightning Experience

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



For more information, see Add Filter Logic and Filter Your Report Data in Salesforce Help.

### Report on New Data

You can also report on new data by adding custom lookup fields to the custom report types.

This type of customization is useful if you want to expose more user fields or custom fields that you've added to contacts. See the Custom Report Type Descriptions section for more information.

# **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

# **Unsupported Components**

The following list identifies which reports are no longer supported in this release.



Tip: The symbol → identifies all the newly unsupported components in this release.

The following components are unsupported:

#### From the **Communities Dashboards**<sup>1</sup> folder:

- Activity 2.0 (and previous versions)
- Content 3.0 (and previous versions)
- Communities Search Dashboard (replaced with version 2.0)
- Groups 2.0 (and previous versions)
- Licenses 5.0 (and previous versions)
- Members 2.0 (and previous versions)
- Moderation 2.0 (and previous versions)
- Overview 2.0 (and previous versions)
- Q&A 2.0 (and previous versions)
- Self-Service 2.0 (and previous versions)
- Topics 3.0 (and previous versions)

### From the **Communities Reports**<sup>2</sup> folder:

- A Comments L30D
- A Posts L30D

# EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

<sup>&</sup>lt;sup>1</sup> You might have an older version of this folder called Communities Dashboards 2.0.

<sup>&</sup>lt;sup>2</sup> You might have an older version of this folder called Communities Reports 2.0.

- A Posts With Most Comments L30D
- A Posts With Most Likes L30D
- A Unique Daily Contributors L30D
- C File Engagement Monthly
- C File Uploads & Downloads Monthly
- C Top 10 Files By Contributions
- C Top 10 Files By Downloads
- C Top 10 Files By Likes
- C Top 10 Files By Shares
- C Top 10 Users Most File Contrib
- C Top 10 Users Most File Uploads L30
- C Top 10 Users Most Liked Files
- Daily Search Frequency (Last 30 Days)
- G Least Active Groups L30D
- G Most Active Groups L30D
- G Top 10 Group Commenters
- G Top 10 Group Posters
- Group Comments (Last 30 Days Trend)
- Group Posts (Last 30 Days Trend)
- L # Cust Comm All Allocated Lic
- L # Cust Comm Logins All Alloct (replaced with 2.0 version)
- L # Cust Comm Plus All Allocated Lic
- L # Cust Comm Plus Logins All Alloct (replaced with 2.0 version)
- L # Partner Comm All Allocated Lic
- L # Partner Comm Logins All Alloct (replaced with 2.0 version)
- L CC Login-based Monthly Logins (replaced with 2.0 version)
- L CC User-based Monthly Logins (replaced with 2.0 version)
- L CCP Login-based Monthly Logins (replaced with 2.0 version)
- L CCP User-based Monthly Logins (replaced with 2.0 version)
- L Cust Comm Login Monthly Usage (replaced with 2.0 version)
- L Cust Comm Login Monthly Trend
- L Cust Comm Member Usage
- L Cust Comm Plus Member Usage
- L Cust Comm Plus Login Monthly Trend (replaced with 2.0 version)
- L Cust Comm Plus Login Monthly Usage (replaced with 2.0 version)
- L PC Login-based Monthly Logins (replaced with 2.0 version)
- L Partner Comm Login Monthly Trend (replaced with 2.0 version)
- L Partner Comm Login Monthly Usage(replaced with 2.0 version)
- L Partner Comm Member Usage
- Logins Used by Customer Licenses

- Logins Used by Partner Licenses
- M Top 10 Members By Login
- M Top 10 New Members By Logins
- Member-based Customer Licenses Used
- Member-based Partner Licenses Used
- Member Logins (Last 30 Days Trend)
- Member Logins (Last 30 Days)
- Member Logins (Last 90 Days Trend)
- Members (Last 30 Days Trend)
- Members (Last 90 Days Trend)<sup>3</sup>
- MO Top 10 Flagged Items
- MO Top 10 Flagged Members
- MO Top 10 Members Who Flag Items
- MO Top 10 Moderators
- New Members (Last 30 Days Trend)
- O Top 10 Group Contributors
- Q Answers in Groups L30D
- Q Best Answers in Groups L30D
- Q Questions in Groups L30D
- Q Top Answered Questions Groups L30D
- Q Unanswered Questions in Groups L30D
- S Answers in User Profiles L30D
- S Best Answers in User Profiles L30D
- S Daily Page Views L30D
- S Daily Unique Visitors L30D
- S Questions in User Profiles L30D
- S Top Answered Qs in User Profile L30D
- S Unanswered Qs in User Profiles L30D
- T Top 10 New Trending Topics L30D
- T Topics Assigned Daily
- T Topics Assigned Monthly
- T Topics Created Monthly

From the **Community Management Home Dashboards** folder—*all* dashboards; you can remove this folder if you installed the package with Chatter<sup>4</sup>

### From the **Community Management Home Reports** folder:

<sup>&</sup>lt;sup>3</sup> If you still want to use the Members (Last 30 Days Trend) and Members (Last 90 Days Trend) reports, you can re-create them. Keep in mind, to get the Member Count field, you need to create a custom report type with Networks as the primary object and Network Members as the secondary object. Then create a report using this custom report type and add the Member: fullname field. This report returns a snapshot of data, not trending data.

<sup>&</sup>lt;sup>4</sup> In the package with Chatter, all dashboards in this folder are no longer supported. In the package without Chatter, this folder and its dashboards still remain.

- Contributions Daily Trend
- Logins Daily Trend<sup>5</sup>
- Logins Monthly Trend<sup>6</sup>
- New Members Daily Trend<sup>7</sup>
- Page Views Daily Trend
- Q&A Daily Trend

From the folder **Insights Adoption** (this entire folder and its contents are unsupported):

- Active Members By Comments
- Active Members By Comments Received
- Active Members By Likes Received
- Active Members By Posts
- Contributors Inactive For 7+ Days (replaced with 2.0 version)
- Influencers Inactive For 7+ Days (replaced with 2.0 version)
- New Members By Comments
- New Members By Comments Received
- New Members By Date Joined
- New Members By Likes Received
- New Members By Posts
- Recent Contributors (replaced with 2.0 version)
- Recent Logins

From the folder **Insights Activity** (this entire folder and its contents are unsupported):

- Discussions By Comments
- Discussions By Likes
- New Discussions (replaced with 2.0 version)
- New Discussions By Comments
- New Discussions By Likes
- New Discussions With No Comments
- New Members' Comments (replaced with 2.0 version)
- New Members' Posts (replaced with 2.0 version)

From the folder **Insights Files** (this entire folder and its contents are unsupported):

- Files By Comments
- Files By Downloads
- Files By Likes
- Files By Posts
- New Image Files (replaced with 2.0 version)
- New Office Files (replaced with 3.0 version)

<sup>&</sup>lt;sup>5</sup> Only unsupported in the package with Chatter. This report still remains in the package without Chatter.

Only unsupported in the package with Chatter. This report still remains in the package without Chatter.

Only unsupported in the package with Chatter. This report still remains in the package without Chatter.

- New Office Files (replaced with 2.0 version)
- New Video Files (replaced with 2.0 version)
- Recent Files (All) (replaced with 2.0 version)
- Recent Files By Comments
- Recent Files By Downloads
- Recent Files By Likes
- Recent Files By Posts

### From the folder **Insights Groups** (this entire folder and its contents are unsupported):

- Groups Recently Archived (replaced with 2.0 version)
- Groups Soon To Be Archived (replaced with 2.0 version)
- Groups With Deactivated Owners (replaced with 2.0 version)
- Groups With Inactive Owners (replaced with 2.0 version)
- New Groups By Dates
- New Groups By Members

# From the folder Insights Moderation<sup>8</sup>

- Content Blocked By Rule
- Content Flagged By Rule
- Content Replaced By Rule
- Discussions Flagged (All)
- Files Flagged By Members
- → Flagged Comments 2.0 (replaced by 3.0 version)
- → Flagged Files 2.0 (replaced by 3.0 version)
- Flagged Messages (replaced by Flagged Direct Messages 1.0 and Flagged Private Messages 1.0 reports)
- + Flagged Posts 2.0 (replaced by 3.0 version)
- Frozen Members (replaced by 2.0 version)
- Messages Flagged By Members
- Moderation Audit 2.0<sup>9</sup>
- Moderation Audit for New Members
- → Posts Pending Approval (replaced by 2.0 version)

# From the folder **Insights Self-Service**<sup>10</sup>:

- Best Answers (replaced with 2.0 version)
- Best Answers From External Members (replaced with 2.0 version)
- Questions (replaced with 2.0 version)
- Questions From New Members (replaced with 2.0 version)
- Questions Most Liked
- Questions With Answers From New Members (replaced with 3.0 version)

This entire folder and its contents are unsupported.
 The contents of this folder were moved to the Moderation Audit Trail folder.

<sup>&</sup>lt;sup>10</sup> This entire folder and its contents are unsupported.

- Questions With Answers From New Members (replaced with 2.0 version)
- Questions With Most Answers
- Questions With New Answers (replaced with 2.0 version)
- Questions Without A Best Answer (replaced with 2.0 version)
- Questions Without An Employee Answer
- Questions Without Answers (replaced with 2.0 version)

### From the folder **Insights Topics**<sup>11</sup>:

- Topics Added (replaced with 2.0 version)
- Topics Assigned (replaced with 2.0 version)
- Topics Most Talked About (replaced with 2.0 version)

### From the Misc Communities Reports folder:

• Questions Escalated - Daily Trend

# 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"

<sup>11</sup> This entire folder and its contents are unsupported.

# EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

# **USER PERMISSIONS**

To create permission sets or enable custom permissions in profiles:

 "Manage Profiles and Permission Sets"

To assign a permission set to a user:

"Assign Permission Sets"

To share a report folder with external users:

 "Manager" folder access or "Manage Reports in Public Folders"

### **External User Permissions Needed to Create and Edit Reports**

To export report data: "Export Reports"

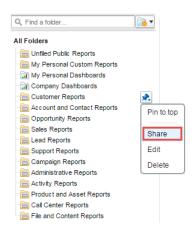
You can give permission to create and edit reports to all role-based external users with licenses such as Customer Community Plus and Partner Community. You can also give permission to all legacy role-based portal licenses such as Customer Portal and Gold Partner.



- 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 with Custom Reports

Create custom reports to track usage, moderation, and other community activity.

?

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

To monitor the health of your community, you can create custom report types and then create a report using that custom report type. If you want your community managers to see your report in Community Management, you can create or edit a dashboard to include your report and then map the updated dashboard in Community Management. To change the mapping of a dashboard, click **Dashboards** > **Settings**.

# **EDITIONS**

Available in: Salesforce Classic and Lightning Experience



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
Chatter Usage	Networks > Feed Revisions	Create reports on posts and comments that your members have edited.
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.

High-level usage	Primary Object > B (Child Object) > C (Child Object, If Applicable)	Description
User Activity	Networks > Network Activity Daily Metrics	Create reports on the daily number of posts and comments by member type.
User Activity	Networks > Network Members > Login History	Create reports on community login activity. This report only includes direct logins to the community. If a user logs in to an org and then switches to a community, their login activity isn't included.
User Activity	Networks > Network Membership Daily Metrics	Create reports on the daily count of total active members, new members added, and external member logins by member type.
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.

<sup>&</sup>lt;sup>1</sup>To report on Chatter Messages, you must have the "Moderate Communities Chatter Messages" permission.



**Note:** You can create reports based on other objects and expose them in Community Management or Community Workspaces. 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 AppExchange Packages for Community Management

# Google Analytics<sup>™</sup> for Salesforce Communities Package

The Google Analytics for Salesforce Communities package contains pre-configured reports that track search activity within a community.

Integrate Google Analytics with your self-service community to track search activity such as article views, page views, and object views. You can also track case deflection from the "Contact Support" page and get insights into the health of your self-service offerings.

# USER PERMISSIONS

To customize or publish a community:

"Create and Set Up Communities"

### IN THIS SECTION:

### Google Analytics<sup>™</sup> for Salesforce Communities

Does your company use Google Analytics to track site analytics? Now you can use it to track search activity in self-service communities and track deflection from cases. Using Google Analytics, you can dive deeply into your community's search behavior and pull that information into meaningful reports.

### Enable Google Analytics<sup>™</sup> for Your Community

Let Google Analytics access your Salesforce data to track community user types, user IDs, page views on Salesforce objects, and customer search activity.

### Set Up Google Analytics<sup>™</sup> for Salesforce Communities

Set up Google Analytics to correctly capture usage and page view metrics for Salesforce communities.

### Install Google Analytics<sup>™</sup> for Salesforce Communities

Install preconfigured reports that integrate Salesforce community data with Google Analytics.

### Google Analytics<sup>™</sup> for Salesforce Communities Report Descriptions

The Google Analytics for Salesforce Communities package contains five reports that track new and returning visitors, page views, and search activity. You can also track case deflection from the Contact Support page and get insights into the health of your self-service offerings.

### Google Analytics<sup>™</sup> for Salesforce Communities Dashboard

The Google Analytics for Salesforce Communities package contains three dashboards that visually display the key metrics tracked in the package.

### Tracking User Flow

The User Flow tracks how different types of users are interacting with the community.

# Google Analytics<sup>™</sup> for Salesforce Communities

Does your company use Google Analytics to track site analytics? Now you can use it to track search activity in self-service communities and track deflection from cases. Using Google Analytics, you can dive deeply into your community's search behavior and pull that information into meaningful reports.

Google Analytics integrates with your self-service community to track user types, user IDs, pageviews on Salesforce objects, and customer search activity.

### The Package includes:

- Search dimensions that can be rearranged for different drilldown configurations.
- Options for tracking user flow
- Reports that can be customized at multiple levels
- Preconfigured reports:
  - Contact Support Page Activity
  - Page Views by New and Returning Users
  - Page Views by Salesforce Object
  - Page Views by User Type
  - Search Activity
- Preconfigured dashboards:
  - Contact Support Activity
  - Search Activity
  - Page Views

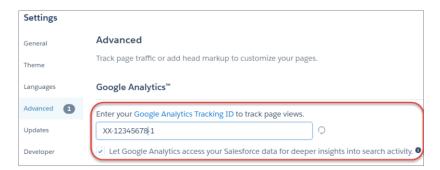
# **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

# Enable Google Analytics<sup>™</sup> for Your Community

Let Google Analytics access your Salesforce data to track community user types, user IDs, page views on Salesforce objects, and customer search activity.

- First, let Google Analytics access your data to collect page views. Go to Settings > Advanced
  in Community Builder and enter your Google Analytics ID. For more information about the
  Google Analytics ID, check the Google Analytics documentation.
- 2. Then select Let Google Analytics access your Salesforce data for deeper insights into search activity to allow Google Analytics to track user types, user IDs, and customer search activity within your community.
- Example: Google Analytics in Builder.



### **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

### **USER PERMISSIONS**

To customize or publish a community

 "Create and Set Up Communities"

When you publish your community to enable the service, your community's search data streams directly to Google Analytics and appears in your Google Analytics reports.

# Set Up Google Analytics<sup>™</sup> for Salesforce Communities

Set up Google Analytics to correctly capture usage and page view metrics for Salesforce communities.

Available in: Salesforce Classic and Lightning Experience

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

**USER PERMISSIONS** 

To customize or publish a community

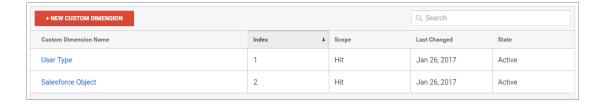
"Create and Set Up Communities"

Enable Google Analytics<sup>™</sup> for your community to integrate your Salesforce data with Google Analytics before you set up Google Analytics.

- Create custom dimensions in your Google Analytics account that capture user type and Salesforce object information. From your Google Analytics account, go to Admin > Property > Custom Definitions > Custom Dimensions. Click +New Custom Dimension. The first dimension you create in your Google Analytics account is automatically sorted as Index 1.
  - **a.** For Index 1, enter the Name: *User Type* and select **Hit** for the scope.
  - **b.** For Index 2, enter the Name *Salesforce Object* and select **Hit** for the scope.
- 2. Create a User-ID view. With the User-ID view, you can analyze how specific segments of traffic with an assigned ID engage with your content. To create a User-ID view, go to **Admin** > **Property** > **Tracking Info** > **User-ID** and follow the instructions.
  - **a.** For the User-ID view, enter the Name: *User Explorer*.



**Example:** Custom Dimensions



Once you've set up Google Analytics to integrate with your Salesforce community, you can create your own reports or install the preconfigured Google Analytics for Salesforce Communities package on page 402. Click here to access the package.



**Note:** Index 1 must be labeled User Type and Index 2 must be labeled Salesforce Object. If these indexes are not aligned with the appropriate labels, incoming data from Salesforce will properly filter into your reports. If you have an existing Google Analytics account with indexes 1 and 2 under different labels, create a separate account to link to Salesforce.

# Install Google Analytics<sup>™</sup> for Salesforce Communities

Install preconfigured reports that integrate Salesforce community data with Google Analytics.

- 1. Make sure you've signed in to your Google Analytics account.
- **2.** Click here or search for Google Analytics for Salesforce Communities in the Google Analytics Solutions Gallery.
- **3.** Click the dropdown next to **Select a View** and select **User Explorer** under the account that you are adding the package to.
- 4. Click Create.
- 5. View your reports from **Customization** > **Custom Reports** in your Google Analytics account.

# **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

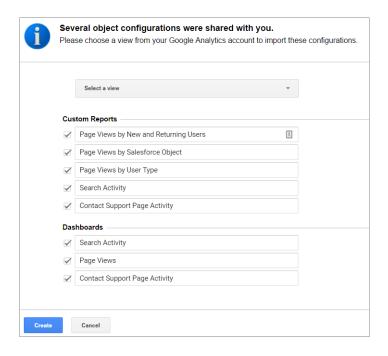
Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

# USER PERMISSIONS

To customize or publish a community

 "Create and Set Up Communities"

# Example:

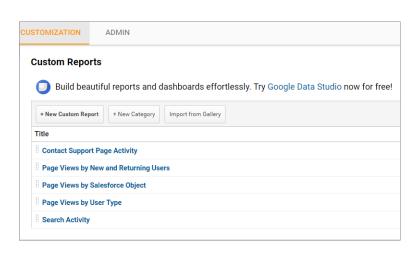


1 Tip: You can drill down into the event type you are interested in viewing from each report. You can also create your own reports in Google Analytics and add them to your User View.

# Google Analytics<sup>™</sup> for Salesforce Communities Report Descriptions

The Google Analytics for Salesforce Communities package contains five reports that track new and returning visitors, page views, and search activity. You can also track case deflection from the Contact Support page and get insights into the health of your self-service offerings.

When you access Google Analytics, your Google Analytics for Salesforce Communities reports are under **Customization** > **Custom Reports**.



# EDITIONS

Available in: Salesforce Classic and Lightning Experience

### IN THIS SECTION:

### Contact Support Page Activity Report

The Contact Support Page Activity report tracks case deflection. This report can help you maximize your self-service offerings by tracking which articles resolved support issues and which subjects resulted in new customer support cases.

### Page Views by New and Returning Users Report

The Page Views by New and Returning Users report tracks which page views are from new users and how many are from returning users.

### Page Views by Salesforce Object Report

The Page Views by Salesforce Object report tracks how many times an object page is viewed.

### Page Views by User Type Report

The Page Views by User Type report tracks how often each type of user is viewing a page.

### Search Activity Report

The Search Activity report tracks which actions users take after entering a term in the search box.

## **Contact Support Page Activity Report**

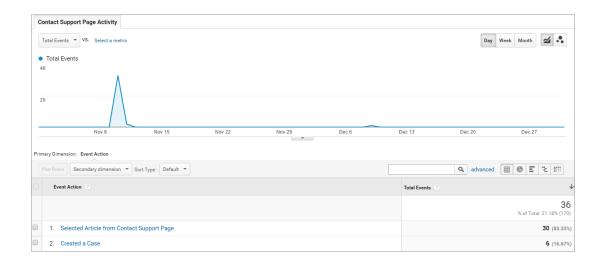
The Contact Support Page Activity report tracks case deflection. This report can help you maximize your self-service offerings by tracking which articles resolved support issues and which subjects resulted in new customer support cases.

When a customer goes to the Contact Support page, they typically have a specific issue that they need help with right away. The customer has the option of entering their question into a search box and either selecting a recommended article or opening up a customer support case. The Contact Support Page Activity report tracks which cases are created and how many times a customer selected an article instead. You can drill into the report to:

- Track how many cases have been deflected from customer support
- See which articles were clicked the most
- See which subjects lead to a new support case

# EDITIONS

Available in: Salesforce Classic and Lightning Experience



# Page Views by New and Returning Users Report

The Page Views by New and Returning Users report tracks which page views are from new users and how many are from returning users.

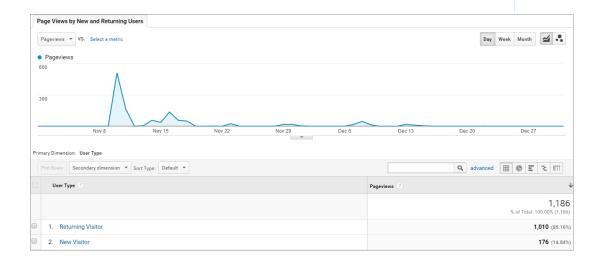
You can drill into the report to:

- Track how active different types of user are within your community
- See which pages are being viewed
- Get detailed information about the pages, such as page title and URL



Available in: Salesforce Classic and Lightning Experience

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



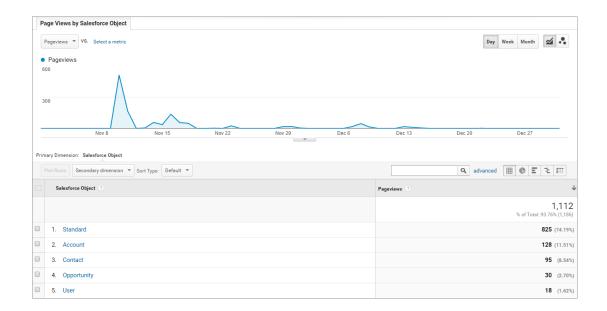
# Page Views by Salesforce Object Report

The Page Views by Salesforce Object report tracks how many times an object page is viewed. You can drill into the report to:

- Track how often an object page has been viewed
- Get more information about the page, such as page title and URL

# EDITIONS

Available in: Salesforce Classic and Lightning Experience



Ø

**Note:** Only overridden pages for objects are captured as different objects. Standard pages like the Home page and Contact Support Page are captured in the "Standard" Bucket.

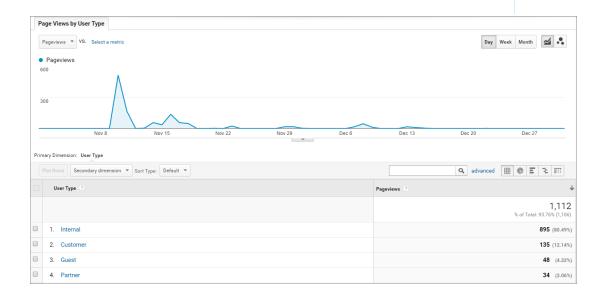
# Page Views by User Type Report

The Page Views by User Type report tracks how often each type of user is viewing a page. You can drill into the report to:

- Select the user type you want to report on
- Get more information about the page, such as page title and URL



Available in: Salesforce Classic and Lightning Experience



# Search Activity Report

The Search Activity report tracks which actions users take after entering a term in the search box.

When a customer enters a term in the search box, recommended articles and similar questions are displayed to them as they type. From there, they can click an article or related question. Customers have the option of searching the entire community or narrowing their search down to a particular topic. They also have the option of asking the community a new question.

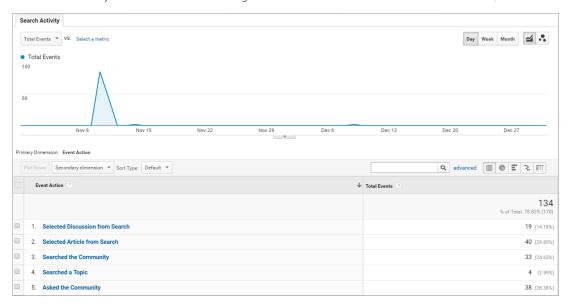
The Search Activity report tracks which action the customer takes from the page that they begin their search on. You can drill into the report to:

- Identify which search terms are being used with each action
- Track how many times a search term is being used



Available in: Salesforce Classic and Lightning Experience

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



# Google Analytics<sup>™</sup> for Salesforce Communities Dashboard

The Google Analytics for Salesforce Communities package contains three dashboards that visually display the key metrics tracked in the package.

When you access Google Analytics, your Google Analytics for Salesforce Communities dashboards are under **Reporting** > **Dashboards** > **Private**. The Google Analytics for Salesforce Communities package contains three dashboards:



Note: The names of the dashboards can be customized. All other labels are not customizable.

# EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

### IN THIS SECTION:

### Search Activity Dashboard

The Search Activity dashboard represents the search activity within the community.

### Contact Support Page Activity Dashboard

The Contact Support Page Activity dashboard represents the activity on the Contact Support page.

### Page Views Dashboard

The Page Views dashboard represents the page views in your community.

# Search Activity Dashboard

The Search Activity dashboard represents the search activity within the community.

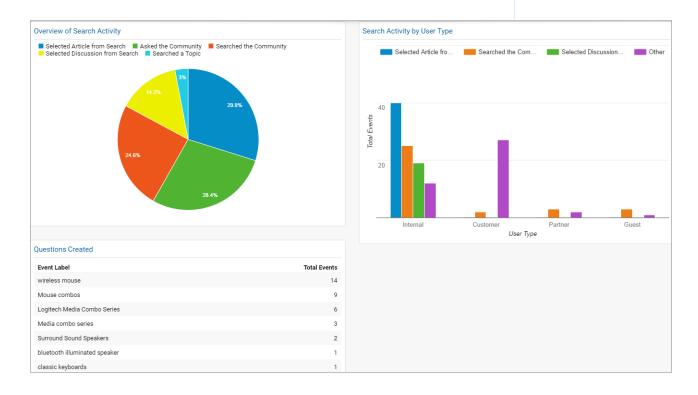
You can get the following information from this dashboard:

- Which actions were taken most frequently
- How Internal, Partner, Customer, and Guest users searched the community
- A list of search terms used to create questions

# **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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



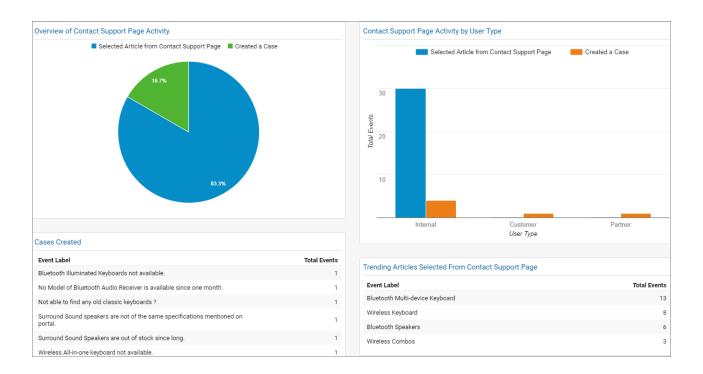
# Contact Support Page Activity Dashboard

The Contact Support Page Activity dashboard represents the activity on the Contact Support page. You can get the following information from this dashboard:

- How frequently a user selected an article or created a case from the Contact Support page
- Which types of users selected an article or created a case from the Contact Support page
- Which subjects lead to support cases
- Which articles were most frequently viewed

# EDITIONS

Available in: Salesforce Classic and Lightning Experience





Note: User Types refer to Internal, Partner, Customer, and Guest users.

# Page Views Dashboard

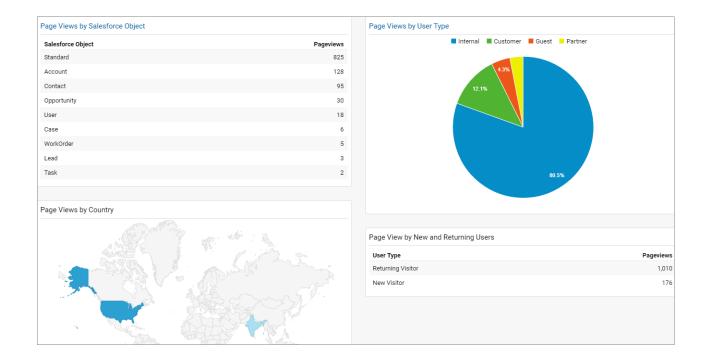
The Page Views dashboard represents the page views in your community.

Track page views:

- By Salesforce object
- By User Type
- By location
- By new versus returning users

# EDITIONS

Available in: Salesforce Classic and Lightning Experience



# Tracking User Flow

The User Flow tracks how different types of users are interacting with the community.

User Flow is a graph that tracks a user's navigation throughout the community. It provides insights into traffic patterns on your site. Traffic patterns provide valuable information a community's effectiveness and the path a user is likely to take when resolving an issue. Go to **Reporting** > **Audience** > **User Explorer** > **User Flow** to view.

# EDITIONS

Available in: Salesforce Classic and Lightning Experience



# Manage Partner Relationships in Communities

Communities is a powerful tool for partner relationship management. Collaborate with your business partners in a community. Invite partners to a community, share records with them, to drive, track, and support channel sales



**Note**: If you have an existing partner portal, you can also continue to use the portal to collaborate with partners. However, we strongly recommend you migrate your partners to a community. Partner portal licenses can be reused in a partner community.

A community allows your partner users to log in to Salesforce through a separate website and access data you've made available only to them. In a partner community, you can:

- Extend Salesforce to securily expose CRM data with partners.
- Recruit, onboard, and educate partners (training and certifications).
- Manage your channel sales with programs, tiers, business plans, and partner scorecards.
- Manage lead distribution, deal registration, and quoting for channel sales.
- Streamline channel marketing with marketing development funds (MDF), marketing campaigns, and co-branded email communications.
- Provide a rich, personalized and mobile-ready experience to drive partner productivity
- Manage, track, and forecast partner sales **alongside** your direct sales in your Salesforce org.

With communities, you can publicly share information that you want all partners to see in a single location. You can also share data privately with specific partner users in the same community and restrict access with the security built into Salesforce. For example, you can pass leads to specific partners. You can also set up multiple communities if your community requirements vary across partners.



**Example:** Here are a few industry examples of how a company can use a community to drive partner sales:

- A technology company can work with resellers to pass leads, register deals, and market products together
- A manufacturer can work with its distributors, wholesalers, and retailers in communities.
- An insurance company can work with independent brokers to track leads and sell insurance products.

SEE ALSO:

Migrating from Portals to Communities

# **Enable Partner Functionality in Your Org**

Buy partner licenses to enable functionality that lets you set up partner accounts and create partner users in your org.

When you buy partner licenses, the following functionality is enabled in your org:

- The default Partner User profile. You can clone it to create custom partner profiles or extend data access via permission sets.
- Three standard partner roles: Partner User, Partner Manager, Partner Executive. When you create partner accounts, you can associate one of these roles with the partner users.
- A sharing rule group and category targeted at partner users.

### **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

# EDITIONS

Available in: Salesforce Classic and Lightning Experience

- The Manage External Account and Enable as Partner buttons on accounts.
- A Manage External User and Enable Partner User button on contacts.



Note: If you have previously purchased partner portal licenses, you already have these features in your org.

# **Templates Supported for Partner Communities**

The choice of template for creating a partner community depends on your company's branding requirements and the development effort you can invest in for the design of your community.

Use the Lightning Partner Management solution to use a highly customizable template that uses slick Lightning components, just like Customer Service (Napili). It comes prepackaged with custom objects, record types, and pages to set up a partner community with leads and marketing management. It also has a rich look and feel that is responsive across devices, including mobile devices.

If you want a quick migration from portals to communities or prefer the Salesforce Classic look and feel, use the Salesforce Tabs + Visualforce template. This option allows heavy rebranding, but you'll need developers with Visualforce skills,

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

### **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

# What's Your Partner Community Strategy?

The type of partner community you create depends on your business, your channel sales program, and the tiers within it. For example, the strategy for a hardware manufacturer with a few partners is different from that of an insurance company with a large agent network.

Try to get early answers to these questions to plan your community strategy:

- How many Partner Community licenses do I need?
  - **1**

**Note**: If you don't need access to all sales objects, such as opportunities, leads, and campaigns, you can also use Customer Community Plus licenses for partners.

- Can I invite all my partners to the same community or do I need multiple communities?
- Do I need a custom partner profile or all the roles?
- What data do I want to share with my partners network?
- What level of data visibility and privacy do I need for my community?

For more ideas on planning your community strategy, check out this Trailhead module for Communities.

# EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

# Migrate from a Partner Portal to a Community

Salesforce recommends that you migrate from partner portals to communities. Portal licenses are supported in communities so you don't require separate community licenses.



**Note:** Starting from Summer '13, partner portals are no longer available for new Salesforce orgs. Existing organizations using partner portals can continue to use their partner portals or migrate to communities. If you don't have a partner portal, but want to share records and information with your partners, try Salesforce Communities. Contact Salesforce for more information.

# EDITIONS

Available in: Salesforce Classic and Lightning Experience

# Why Migrate from Portals to Communities?

Communities offer all the functionality available in portals and customer portals, plus more features including:

- A responsive, mobile-ready, prepackaged Lightning Partner Management solution
- Build personalized, rich experiences with your company's branding
- Chatter collaboration with groups, file sharing, and feeds
- Access to reports and dashboards plus the ability to create custom reports for your community
- Single sign-on and login support for multiple authentication providers
- Content moderation, direct messages, and much more
- Single location where you can design, moderate, and manage your community

Plus, we're working round the clock to bring you more features in every release.

See the Migrating from Portals to Communities guide for more information on how to migrate your portal users and data over to a community.

# If You Continue to Use Partner Portals

LICED DEDANGGIONIC

All the information about setting up partner accounts, users, portals, and tracking partner sales is available in the Salesforce Partner Portal Guide.

# Prep Your Org for a Partner Community

USER PERMISSIONS	
To view accounts:	"Read" on accounts
To create accounts:	"Create" on accounts
To disable a partner account:	"Manage External Users"
To create, edit, disable, or deactivate partner users:	"Manage External Users"
To create contacts:	"Create" on contacts
To view contacts:	"Read" on contacts
To create, edit, and delete profiles:	"Manage Profiles and Permission Sets"
To set field-level security:	"Manage Profiles and Permission Sets" AND "Customize Application"
To set sharing rules:	"Manage Sharing"

# **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

You've bought your partner licenses and have partner functionality enabled in your org. You're ready to collaborate with your partners and start closing deals together! Before you actually create a partner community, work with your channel manager to create partner accounts and users, assign partner roles, and manage permissions.

At the very outset, set up the channel manager role and assign it to the internal users in your org who manage channel sales and work with partner organizations.

Channel managers with the necessary permissions can perform the next steps.

- 1. Each partner account is automatically assigned three partner roles.
  - Tip: We strongly recommend that your reduce the number of roles to one role: Partner User. To avoid role proliferation, it's better to use one role and grant super user access to users who need access to other users' data.
- 2. In Setup, type *Sharing Settings* in the Quick Find/Search box and edit the organization-wide defaults. Set the Default External Access setting to **Private** for all the objects you want to share with your partners.
- **3.** Clone and customize the Partner User profile per your community's needs and, if necessary, grant extra permissions with a permission set.
- **4.** Create a partner account for each partner organization you work with. Partner accounts store details about partner users and their sales data.
- **5.** Also, plan how you want to use sharing rules to share data with partners.
- **6.** Add users from each partner company as contacts on the respective partner account.
- 7. Convert the contacts on the partner account to partner users and assign a partner license, profile, and role.
- **8.** Optionally, enable and grant super user access to partner users if you want them to view data owned by other users in their role hierarchy.
- **9.** If you work with many partner users or don't want to deal with user management for a partner organization, consider delegating user administration.

With that, you're ready to set up a community and assign partner users to it.

# Set Up the Channel Manager Role

Channel managers are internal users who manage your partner accounts and partner users. Before setting up a partner community, identify an internal user to play the channel manager role.

# Channel Manager Role

Ideally, channel managers should create all the partner accounts for the partner organizations they manage. All partner users associated with a partner account automatically fall below the channel manager in the partner role hierarchy. So all the data owned by those partner users rolls up and is visible to the channel manager.

# EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

# Channel Manager Profile

Profiles determine the permissions users have, page layouts they see, the tabs and record types available to them, and other settings. Create a custom profile for channel managers or use a permission set to grant permissions to a standard profile. A few tips on what you might want to include:

### Grant the "Manage Partners" permission

When this permission is enabled, channel managers can create partner accounts and partner users.

### Make the following objects available to channel managers

Leads, Accounts, Contacts, Opportunities, Documents, Campaigns, Products, and any other object you plan to share with partner users in your community.

### **Assign record types**

Assign record types to channel manager profiles. For example, the Lightning Partner Management solution includes two lead record types: one to track sales leads and the other to register deals. Make sure that your channel manager has access to both.

### Make the Partner Account field visible to channel managers on leads, accounts, and opportunities

Channel managers can create list views or reports for tracking partner user activity.

### **Assign page layouts**

Assign the appropriate page layouts to your channel manager profiles.

### Make the Last Transfer Date field visible to channel managers on leads

Channel managers can create lists views or reports for tracking partner user activity.

# More Tips

- Create a public sharing group for channel managers. You can use this group for filtering and controlling access to documents.
- Create a lead gueue for channel managers. You can use this gueue for lead assignment rules.

### **Create Partner Accounts**

Add each company with which you partner to Salesforce as a business account. We recommend that channel managers create partner accounts so they can view all partner data.

Partner accounts are Salesforce accounts that a channel manager uses to manage partner organizations, partner users, and activities when using a partner community or a partner portal. A channel manager who owns a partner account can access all the data associated with the partner account and the associated partner users.



**Note:** The partner user role is a subordinate of the account owner's role. All data for the partner user role rolls up to the partner account owner's role. Keep in mind that if you disable a partner user, their partner user role becomes obsolete and their data no longer rolls up to the partner account role.

- 1. Create a new business account.
- 2. Click Manage External Account and then, click Enable as Partner.
- 3. In the confirmation dialog, select Yes, I want to enable this account as a Partner Account.
- 4. Click Confirm.



### Note:

- If your organization has person accounts, they cannot be used as partner accounts.
  Only business accounts can be used as partner accounts.
- Partner accounts can't be deleted, but can be disabled.

# **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

# **USER PERMISSIONS**

To view accounts:

"Read" on accounts

To create accounts:

"Create" on accounts

To create a partner account:

"Manage External Users"

Once you create a partner account, you can add users to the account as contact records and then convert them to partner users. Partner users are Salesforce users with access to CRM objects, such as opportunities, leads, and campaigns. Partner users can access and modify the Salesforce data you share with them by logging into a community.

### Disable Partner Accounts

You can't delete partner accounts, but you can disable them. Disabling a partner account disables partner users associated with the account. We recommend disabling a partner account only if the account was accidentally enabled for community access.

If you choose to disable a partner account:

- Up to 15 active and inactive external users associated with the account are permanently disabled. You also remove them from all communities, groups, teams, permission sets, and sharing rules they're associated with.
- If there are more than 15 active or inactive external users associated with an account, you can't disable it. Disable the users before disabling the account.
- Roles and groups associated with the account are permanently deleted and not moved to the Recycle Bin.
- 1. Go to the Account detail page for the account you want to disable.
- 2. Click Manage External Account, then click Disable Partner Account.
- 3. Click **OK** to confirm.

If you decide to re-enable the account in the future, you can re-enable individual contacts as partner community users. Re-enabling a contact for a partner community creates a partner user record that is not associated with the previous partner user and role. You can't restore deleted roles and groups.

# **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

# **USER PERMISSIONS**

To view accounts:

"Read" on accounts

To create accounts:

"Create" on accounts

To disable a partner account:

"Manage External Users"

### Create Partner Users

After you create a partner account, add users to the account as contact records and then convert them to partner users. Partner users are Salesforce users with access to CRM objects such as opportunities, leads, and campaigns. Partner users can access Salesforce data when they're invited a community.

- Tip: Before creating partner users, configure your community so your partner users don't log in to your community before it is ready.
- 1. View the partner account contact you want to convert to a partner user.
- **2.** On the contact detail page, click **Manage External User** and choose **Enable Partner User**.
- **3.** Edit the user record for this partner and assign a partner license, role, and profile.
  - ? Tip: You can use a Customer Community Plus license if the user doesn't require access to CRM objects, such as opportunities, leads, and campaigns.

### 4. Click Save.

After you create a partner user, you can edit the partner account and the partner user independently. Changes made to one are not reflected in the other.

Tip: To check or troubleshoot issues with the partner use account, on the contact detail page, click **Manage External User** and choose **Log in to Portal as User**. A new browser window opens and you are logged in to the community as a community user.

Consider the following when creating partner users:

• The available profiles for the partner user are limited to the Partner User profile or profiles that have been cloned from it.

# **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

# **USER PERMISSIONS**

To create, edit, disable, or deactivate partner users:

"Manage External Users"

To create contacts:

"Create" on contacts

To view contacts:

"Read" on contacts

- The **Role** drop-down is read-only the first time you enable a contact as a partner or customer user for an account. The next time you enable a contact on this account as a customer or partner user, you can select a **Role** for the user.
- Unlike a standard user, the partner user role is automatically assigned based on the account name.
- The partner user role is a subordinate of the account owner's role. All data for the partner user role rolls up to the partner account owner's role. Keep in mind that if you disable a partner user, their partner user role becomes obsolete and their data no longer rolls up to the partner account role.
- Partner users and contacts cannot be deleted. If you no longer want a partner user to have access to their community, deactivate the partner user.
- If you have enabled a user as a delegated administrator, note the following requirement. Before the user can create an external user, you must add at least one partner profile to the Assignable Profiles related list and assign the user the "Manage External Users" permission.

### Partner User Profile

When you buy Partner Community licenses, the Partner User profile is automatically created in your org. The Partner User profile can't be modified, but you can clone it or create permission sets to specify what partner users can do.



**Note:** The Partner User profile is also available in your org if your organization has bought Partner Portal or Customer Community Plus licenses.

The profile you assign to partner users defines what data they can access within a community. For example, you can control whether users can view, create, or edit cases and custom object records using profiles and permission sets. You can also clone the Partner User profile and create custom profiles with varying permissions.

# **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

For each cloned profile, ensure that the "API Only User" permission is not selected. Users associated with this permission selected aren't able to log in to their communities.

# Partner User Roles

**USER PERMISSIONS** 

# To manage partner users: "Manage External Users" To create, edit, and delete profiles: "Manage Profiles and Permission Sets" To create, edit, and delete page layouts: "Customize Application" "Manage Profiles and Permission Sets" AND "Customize Application" To set sharing rules: "Manage Sharing"

### **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

When you enable the first external user on a partner account, a user role hierarchy is created for that account. This role hierarchy rolls up to the account owner (typically, the channel manager). The three roles in this hierarchy are Partner User, Partner Manager, or Partner Executive. When you create contacts on the partner account and convert them to external users, assign one of these roles to them.

The Partner User role rolls up to the Partner Manager role, which rolls up to the Partner Executive role. The Partner Executive role rolls up to the Channel Manager role. Partner users at a given role level are able to view and edit all data owned by or shared with users below them in the hierarchy, regardless of your org's sharing model.

The role names include the partner account name. For example, if the partner account name is Acme, the three roles created for the account are called Acme Partner User, Acme Partner Manager, and Acme Partner Executive. If the ownership of a partner account is changed to another channel manager, the partner user role is moved to that location in the role hierarchy.



Tip: We recommend that you reduce the number of roles to one. Grant super user access to partner users if you want them to see other partner users' data.

You can delete partner roles, in which case the roles are renamed to maintain the hierarchy. For example, if the Manager role is deleted from a three-role hierarchy of Executive, Manager, and User, then the Executive role is renamed to Manager but its object ID remains the same. When you create a partner role, it is automatically placed at the bottom of this hierarchy. You can delete multiple roles in bulk for better performance. For example, if most of your users are assigned the User role, you can delete the Executive and Manager roles. For more information on deleting partner roles, see the SOAP API Developer's Guide.

### SEE ALSO:

Set the Default Number of Community Roles

# Sharing Data with Partner Users

Sharing groups and a sharing rule category are available by default in your org to share Salesforce data with partner users in a community.



Tip: Org-wide defaults and field-level security also control data access for partners in communities. Set the Default External Access setting to **Private** for all the objects you want to expose to partner users in your community.

After you buy partner licenses for your org, the following groups and sharing rule category are created:

Group or Category	Description
All Partner Portal Users group	Contains all partner users in your organization
All Internal Users group	Contains all Salesforce users in your organization
Roles and Internal Subordinates sharing rule category	Allows you to create sharing rules in which you can choose specific Salesforce users in your organization by role, including users in roles below the selected role. Partner roles are excluded.

Use these groups and the sharing rule category to easily create sharing rules that grant all community, portal, or Salesforce users access to specific data. You can also create sharing rules to share records between community users and internal Salesforce users, but not between partner users associated with different partner accounts.

# **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

# **USER PERMISSIONS**

To manage partner users:

"Manage External Users"

To set field-level security:

 "Manage Profiles and Permission Sets"

AND

"Customize Application"

To set sharing rules:

"Manage Sharing"



**Note:** Customer Community licenses support sharing sets, but not sharing rules. And sharing sets don't support objects that are associated with multiple other objects of the same type, for example, the Contacts to Multiple Accounts feature. To use such features, your community members must have the Customer Community Plus or Partner Community license.

# Grant Super User Access to a Partner User

Super user access allows partner users to view data owned by other partners or users below them in their role hierarchy. For example, you can allow managers in your partner accounts to view the data owned by their direct reports.

A few things to consider before you grant super user access to users:

- Enable Partner Super User Access in your Communities Settings before granting access to individual partner users.
- Partner super user access applies to cases, leads, custom objects, and opportunities only.
- Partner super users can access all the data owned by other users below them in the partner
  account hierarchy, regardless of sharing rules and even when the org-wide default setting is
  set to Private.

For example, consider two partner super users with the same role under the same account. User A owns a few opportunities, and User B has manual share to another opportunity. This gives User A access to all opportunities owned by User B, and User B can access all of User A's opportunities.

# **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

# **USER PERMISSIONS**

To enable Partner Super User Access:

"Customize Application"

Partner Super Users with Role		Can Access Data Owned
in the sam		User roles below them in
Partner Manager	in the same i	sers and partner super users ole low them in the hierarchy
Partner User	er User All partner users the same role (U	

- Use this information to grant super user access to users with Partner Community licenses.
- 1. View the contact record for the user on the partner account.
- 2. Click Manage External Account, then choose Enable Super User Access.
- 3. Click OK.

This grants super user access to the user with a Partner Community license. You can also grant super user access to users with Customer Community Plus licenses.

### SEE ALSO:

Grant Super User Access to Customer Users in Your Community Enable Super User Access for Your Communities

### **Enable Leads for Partner Users**

If you are using the Salesforce Tabs + Visualforce template, enable leads for partner users in your community so that they can access and create leads in your communities.

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

- 1. Open Community Workspaces or Community Management.
- 2. Click AdministrationTabs, and add the Leads tab to the list of available tabs in your community.
- **3.** In Setup, set tab visibility and object permissions. You can either set them on the profile or using a permission set. We recommend using a permission set if you plan to apply these permissions selectively.
  - **a.** If using a permission set, use the following settings for leads:
    - In the Tab Settings, select Available and Visible.
    - In the Object Settings, select "Read," "Create," and "Edit."
  - **b.** If using a profile, such as the Partner User profile, set the leads tab setting to Default on and enable the "Read," "Create," and "Edit" object permissions for leads.

# **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

### **USER PERMISSIONS**

To enable leads for partner users:

 "Manage Profiles and Permission Sets"

- **4.** Optionally, you can assign extra permissions that enable advanced features for your partners. If you plan to apply these permissions to only some of your partner users, we recommend creating separate permissions sets.
  - Note: Partner users with legacy portal licenses can use these advanced features in communities, but not in portals.

Feature	Partner User Permission Needed
To import leads using the <b>Import Leads</b> 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 <b>Import My Organization's Accounts &amp; Contacts</b> link on the Accounts and Contacts tabs in your community.	Optionally, "Import Personal Contacts"
To change the status of multiple leads via the <b>Change Status</b> button.	"Manage Leads"
To change the owner of multiple leads via the <b>Change Owner</b> button.	"Transfer Leads"

# **Delegate External User Administration**

If your partner organizations have a large number of users, you can delegate user administration to external users.

Available in: Salesforce Classic

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

External users who are delegated administrators can:

# **USER PERMISSIONS**

To manage external users:

"Manage External Users"

To create, edit, and delete profiles:

 "Manage Profiles and Permission Sets"

- Create and edit external user records
- 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.

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

- 1. From Setup, enter *Profiles* in the Quick Find box, then select **Profiles** and click a custom profile.
- 2. Click Edit.
- 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.
- Make sure accounts and contacts are available in your community.
- Optionally, set field-level security and page layouts so that delegated external user administrators can access only the account and contact fields you specify.

### SEE ALSO:

Create Communities Users
Grant Super User Access to a Partner User
Share More Salesforce Object Data in Your Community
Add Tabs to Your Community

# 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 and Lightning Experience

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"

# Assign Cases to a Partner User

Assign cases to partner users so they can view, modify, and update case information.

Before you assign cases to partners, configure cases for partners. You can only assign cases that you have access to.

- 1. On the case detail page, click [Change] next to the Case Owner field.
- 2. Select Partner User from the Owner drop-down list and enter the name of the partner user.
- **3.** Optionally, select the **Send Notification Email** checkbox to send an email to the new owner.
- 4. Click Save.

The partner user can view and edit the case from their community.



### Note:

- Case comments added by partner community users are public and visible to any user that can view the case.
- You can create case assignment and escalation rules that automatically assign cases to partner users based on criteria that you define.

# **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

# **USER PERMISSIONS**

To assign cases to partners:

"Edit" on cases

AND

"Transfer Cases" or "Transfer Record"

# Assign Leads to Partner Users

You can assign leads to partners or allow partners to drive their own lead gueue.

You can:

- Assign each lead to an individual partner user.
- Assign leads to a lead gueue and allow partner users to claim leads from the gueue.
- Use lead assignment rules to automatically assign leads to partner users or queues based on certain properties of those leads.



Note: User actions in a community don't trigger assignment rules.

Assigning a lead to a partner user or partner lead queue is just like assigning a lead to any other user or queue. Leads assigned directly to a user or a queue that is not part of the lead pool are shown on the community's Leads page or tab. The partner user can see leads by selecting the appropriate list view. Until a partner user has reviewed a lead, it displays in bold, and is in the My Unread Leads list view.

If a lead is assigned to a queue that is in the lead pool, the lead displays in the Available Leads list.

# **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

# **USER PERMISSIONS**

To assign leads to partner users:

"Edit" on leads



Tip: Assign partner leads to someone with a Partner Manager or Partner Executive role in the partner account. The manager can then manage lead assignment for the partner users in that account.

# Assign Tasks and Events to Partner Users

If you have added a calendar to your community, you can add events to it. Partner users with the "Edit Events" permission can create and edit their own events. Also, with the appropriate field-level security settings, partner users can view and create activities related to leads or opportunities.



**Note:** Calendars, events, and activities are only available in the Salesforce Tabs + Visualforce template.

Partner users can add tasks to leads or opportunities as reminders of particular tasks they should perform. Administrators and channel managers can view the activity history for a particular lead or opportunity, or use reports to track activities assigned to partner users. A partner user can only add tasks for or see calendars shared by:

- Other partner users assigned to the same account.
- The channel manager for their account.



**Note**: The following event and calendar features are not supported in communities: spell check, event updates, enhanced list views, drag-and-drop scheduling, calendar sharing, and hover details.

### **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

# **USER PERMISSIONS**

To assign events to partner users:

"Edit Events"

# **Educate Your Users About Communities**

Tell community members what to expect from their community experience.

### IN THIS SECTION:

### Access Your Communities from Salesforce

Internal Salesforce users who are also community members can easily access communities using the global header. The global header is not available by default; the org administrator must enable it for community members.

### Share Personal Contact Information Within Communities

Users can specify which information from their profile is visible to external users, such as customers and partners, and guests viewing publicly accessible pages that don't require login.

### Search Behavior in Communities

Search capabilities in communities can make or break a member's experience. Search in communities is different depending on whether your community is using a Community Builder-based template or a Salesforce Tabs + Visualforce template. In general, searches within a community return results specific to that community.

### Manage Your Community Email Notifications

Use email notifications to keep up with important updates in communities.

Who Can See What in Communities

### **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

# Access Your Communities from Salesforce

Internal Salesforce users who are also community members can easily access communities using the global header. The global header is not available by default; the org administrator must enable it for community members.



**Note:** Orgs that enabled Communities before Winter '14 see the new global header by default when they turn on Communities.



# EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

The menu on the left side lets you switch between communities and your internal org. Switching between your internal org and your communities doesn't 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. Also, you can work in multiple communities at once from separate browser tabs.

- The dropdown shows all the active communities that you're a member of.
- If you have the "Create and Set Up Communities" permission, you also see communities in preview that you're a member of.
- Internal users who aren't members of any community only see the company name.
- External users see the dropdown menu only if they belong to more than one active community.
- If an external user who is only a member of one active community is given the URL for a community in preview, they don't see the dropdown menu in the community.
- (1) Important: If your org is setting up a My Domain that hasn't finished deployment of the new custom domain, switching from a community to your internal org directs you to the Salesforce login page instead. This can happen when you've logged in using a My Domain URL that has been registered but not yet deployed. Once your domain is deployed, selecting your organization in the dropdown directs you to the internal organization as expected.

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

(1) Important: The global header isn't supported in Lightning Experience, so to create, manage, or access communities from the Global Header, switch back to Salesforce Classic. If your org is using Lightning Experience, users with the appropriate permissions must switch to Salesforce Classic to access the global header.

SEE ALSO:

Set Up and Manage Salesforce Communities

# **Share Personal Contact Information Within Communities**

Users can specify which information from their profile is visible to external users, such as customers and partners, and guests viewing publicly accessible pages that don't require login.

When interacting with other community members, it's important to balance being visible and accessible with protecting your personal contact information. You may not want to show your job title, phone numbers, and other contact details outside of your internal organization. Your customers and partners may not want other customers and partners viewing all their contact information.

Use either the user interface or API to control visibility. You can choose to expose fields to employees only, members of the community from outside your company, or guest users who aren't required to log in. Some fields are always visible to everyone accessing the community Some fields allow up to three levels of visibility, while others allow fewer.

- Employees—Only members from the internal organization can view.
- External—Members from the internal organization and external members, such as customers and partners, can view. External users are users with Community, Customer Portal, or partner portal licenses.
- Public—Anyone can view, including guest users viewing publicly accessible pages that don't require login. Guest users can access public pages in communities via the Guest User license associated with each site or community.

In the API, setting a field to true on the User object makes it visible to the type of user indicated in the field name (external or guest users).

Consider these tips about the visibility of your contact information.

- Your chosen settings apply to every community you're a member of.
- When a user is restricted from viewing a contact information field, there are differences in what's displayed in the user interface versus the API.
  - In the user interface, the restricted field is hidden from your profile everywhere that it usually displays in a community. If your
    organization displays your profile information on custom Visualforce pages, the field still displays, but with the value #N/A.
  - In the API, a field set to false returns the value #N/A.
- Information in hidden fields on a profile is not searchable by other partners and customers in the community, but is searchable by users in the company's internal organization.

# **Default Visibility Settings for Contact Information**

This table summarizes the default visibility settings for contact information and your options for restricting visibility.

Contact Information		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	N/A
			displays this information. If your administrator has enabled nickname display, your nickname displays	
			in place of your first and last names in most locations.	

Contact Information		Where to Set in User Interface	Options for Restricting Visibility	API Controls on User Object
Title External	External	Name > Edit Contact Info, then click About	Employees, external, or public	UserPreferencesShowTitleToExternalUsers
				UserPreferencesShowTitleToGuestUsers
				Note: When the guest user preference is set to true, the job title field is visible to external members even if the external member preference is set to false.
Profile photo	External. Users without access see the stock photo.	On your profile page, click <b>Update</b> under your photo (or <b>Add Photo</b> if you haven't added a photo yet), then select Show in communities with publicly accessible pages	External or public	UserPreferencesShowProfilePicToGuestUsers
City Country Email Fax	Employees		Name > Edit external, or public Contact Info, then	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.
Mobile Phone				UserPreferencesShowCityToExternalUsers
State				UserPreferencesShowCityToGuestUsers
Street Address				UserPreferencesShowCountryToExternalUsers
Work Phone				UserPreferencesShowCountryToGuestUsers
Zip/Postal Code				UserPreferencesShowEmailToExternalUsers
				UserPreferencesShowEmailToGuestUsers
				UserPreferencesShowFaxToExternalUsers
				UserPreferencesShowFaxToGuestUsers
				UserPreferencesShowManagerToExternalUsers
				UserPreferencesShowManagerToGuestUsers
				UserPreferencesShowMobilePhoneToExternalUsers
				UserPreferencesShowMobilePhoneToGuestUsers
				UserPreferencesShowPostalCodeToExternalUsers
				${\tt UserPreferencesShowPostalCodeToGuestUsers}$
				UserPreferencesShowStateToExternalUsers

Contact Information	Where to Set in User Interface	Options for Restricting Visibility	API Controls on User Object
			UserPreferencesShowStateToGuestUsers
			${\tt UserPreferencesShowStreetAddressToExternalUsers}$
			${\tt UserPreferencesShowStreetAddressToGuestUsers}$
			${\tt UserPreferencesShowWorkPhoneToExternalUsers}$
			UserPreferencesShowWorkPhoneToGuestUsers

# Search Behavior in Communities

Search capabilities in communities can make or break a member's experience. Search in communities is different depending on whether your community is using a Community Builder-based template or a Salesforce Tabs + Visualforce template. In general, searches within a community return results specific to that community.



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

### For all communities:

Search behavior in communities is different from searches in the internal org:

- In general, searches within a community return matches from within the community. To find items from a different community, members must leave the current community and search from within the other community.
- In community search results, members can see what they have access to through their profiles and permission sets. In addition, they can also view data that is explicitly shared with them in the community context. This can include internal company content and records not explicitly shared with the rest of the community. For example, if the user's profile allows access to accounts, but the accounts tab isn't exposed in the community, the member can still view account data in their search results.
- For user searches performed by external users of a community, global search and enhanced lookup search (with the **All Fields** option selected) query the following limited set of fields:
  - Name
  - Username
  - User ID
  - Body
  - Email
  - Phone
  - Custom fields

For example, say an external community member searches for a user, John Doe, by his alias jdoe. If that term isn't contained in any of the searchable fields in the user object, John Doe's record isn't included in search results.

- Search results include all the records and files that a community member has access to. This includes records not explicitly exposed in the community or records and files they have access to in the internal Salesforce organization. In file searches, users can see:
  - Files they own
  - Files shared with them directly

# **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

- 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.
- The Search Results component shows a list of search results limited to articles and discussions.
  - Note: Only articles that have a topic associated to them in Topic Management populate in the Search Results component.
- The Global Search Results component lets members see search results in one tab (All), or in separate tabs for cases, accounts, contacts, and any other object exposed in the community (including custom objects) to which they have access.
  - Note: Admins must associate a tab to a custom object to make it searchable in global search.
- The Search & Post Publisher component gives admins the option to set up autocomplete search results. These suggested search results populate based on objects made searchable in the community, and included in autocomplete search.

#### For 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

**EDITIONS** 

Available in: Salesforce Classic and Lightning Experience

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

set your group email preferences using the **Email Me...** drop-down on each group's page. You can choose to receive a daily or weekly digest email or an email every time someone posts. This option is visible if you're a group member.

Your email options are similar to the Chatter email settings in your internal organization under your personal settings ( *Your Name* > **My Settings** > **Email Settings** for Chatter Free users). Within communities, however, note the following differences.

- The default notification frequency for new groups you join can't be set via the user interface. It can be set only via Salesforce APIs (SOAP API and REST API).
- Personal digests aren't currently available.
- If your community has Chatter messages enabled, you're notified of file shares in a message. If Chatter messages aren't enabled, you are notified of file shares by email.
- If flagging is enabled in the community, the Flags an item as inappropriate option appears for all members of the community, but only sends notifications if:
  - You're a group owner or manager and a member flags a post, comment, or file in your group.
  - You're a moderator and a member flags a post, comment, or file you have access to. Depending on the type of notification you
    want to receive, you also need following permissions:

Email Notifications About	Required Permission
Flagged posts and comments	"Moderate Communities Feeds"
Flagged files	"Moderate Communities Files"
Flagged Chatter messages	"Moderate Communities Feeds" and "Moderate Communities Chatter Messages"
Flagged direct messages	"Moderate Communities Chatter Messages"

If the **Flag as Inappropriate** link doesn't work in your email, try flagging the message from the UI.

### 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	Not available	Not available

### **EDITIONS**

Available in: Salesforce Classic and Lightning Experience

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

	Administrator or Salesforce user with "Create and Set Up Communities" permission	Salesforce Community Member (all Salesforce licenses including Chatter Free and Chatter Only)	External Community Member (Customer Portal, Partner Portal, Partner Community, or Customer Community license)
	"Customize Application" permission to create or customize communities.		
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.	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.	The drop-down in the global header shows a list of communities the user has access to.  Can't access communities in
	Can access setup for all communities regardless of status.  Can see communities in Preview status.	setup for all  can't access communities in  Inactive status. Can see  communities in Preview  status if a link is provided.	Inactive status. Can see communities in Preview status if a link is provided.
Your Name menu in Global Header	Same as in internal organization.	Same as in internal organization. Chatter Free users see a My Settings menu, an Edit Contact Info menu, and a Logout link. For Chatter Free users, the My Settings menu opens an overlay where they can update location settings, security settings, email settings, and approved connections. These settings apply across the internal organization and all communities that users have access to. This overlay is different from the My Settings page that other internal users see if the organization has enabled the improved Setup user interface.	Can see a My Settings menu, an Edit Contact Info menu, and a Logout link. For external users, the My Settings menu opens an overlay where they can update location settings, security settings, email settings, and approved connections. These settings apply across all communities that users have access to. This overlay is different from the My Settings page that other internal users see if the organization has enabled the improved Setup user interface.
Access to Community Workspaces or Community 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	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	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)
	doesn't appear for communities created using the Salesforce Tabs + Visualforce template. This menu only appears within Community Management.	created using the Salesforce Tabs + Visualforce template. This menu only appears within Community Management.	
Salesforce Online Help	Can see Salesforce Online Help.	Standard Salesforce user sees Salesforce Online Help. Chatter Free user sees Chatter help.	Not available
People	Can see everyone else in the cor	nmunity and vice versa.	
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 org.	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.

	Administrator or Salesforce user with "Create and Set Up Communities" permission		External Community Member (Customer Portal, Partner Portal, Partner Community, or Customer Community license)
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	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.
	the "Create and Own New Chatter Groups" user permission.		
Files	•	d 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.

#### **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)** Cannot see profiles of users in the internal organization. Profile visibility enforces user sharing. Recommendations User gets people, group, file, and record recommendations for the current community only. Activity and Influence Can see activity statistics and influence for the current community. Can see activity statistics and influence for the current All activity on records, such as posts and comments, is counted in community. the user's internal organization and not in the community where the activity occurred. All activity on records, such as posts and comments, is not counted in the user's activity statistics and influence. **Email Notifications** Email notification preferences 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, standard Salesforce community, external users can community, users can control user can control their Chatter control their Chatter email their Chatter email notifications in their personal settings. email notifications in their notifications under Your personal settings. Name > My Settings > Email Can control email notifications **Settings**. Portal users can also Can control email notifications for their internal organization control group email notifications from their personal settings. for their internal organization on each group's page. from their personal settings. (Enter Chatter in the Quick Find box, then select (Enter Chatter in the Chatter personal email digests Ouick Find box, then select **Email Notifications**.) 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. page. 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

	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)
		every post is disabled when groups exceed 10,000 members. All members who had this option selected are automatically switched to daily digests.	
Topics	• .	ter topics, including topics in feeds alked About topics for the current	
Favorites	Can add search, topic, and list vi community.	ew favorites in the current	Can add only topic favorites in the current community.
Chatter Messages	In their list of Chatter messages, can see private messages they have sent or received in their internal organization and any communities they're a member	•	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.
	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	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	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.
	is a member of.	is a member of.	Chatter messages are accessed
	Administrators with "Manage Chatter Messages" and "API Enabled" permissions can delete messages.		through the Chatter tab, which may be disabled for external community members. Administrators should ensure
	The API allows users to send Chatter messages across communities.		that the Chatter tab is enabled if using Chatter messages in communities.
Messenger (Chat)	Messenger is not available with	Communities.	

# Feeds Visibility

The following table shows what each kind of user can do or see in Chatter Feeds within a community.

	Salesforce Administrator	Salesforce Community Member	External Community Member (Customer Portal, Partner Portal, Partner Community, or Customer Community license)
Post on a record	Can post on any records within the community.	Can post on any records within the community to which the user has access.	Can post on any records within the community to which the user has access.
Bookmark a post	Can bookmark posts within the current community. The Bookmarked feed only contains posts from the current community.		
Mention someone	Can mention people specific to t mention an external user on an	he current community. User can't internal post.	Can mention people specific to the current community.
Share a post (repost)	Can share a post only in the current community.		
Add topics to a post		atter topics to any posts within the ty and can't be accessed from and	

## Search Visibility

Search behavior in communities varies slightly from the search in the internal organization. Search results respect sharing rules for all items by default. The following table describes what each type of user in a community can see in search results.

Search Results For	Administrator	Salesforce Community Member	External Community Member (Customer Portal, Partner Portal, Partner Community, or Customer Community license)
People	People specific to the current	community.	
Users		ds on a profile is not searchable be searchable by users in the compa	•
	<ul> <li>Portal users can't search for users in the community when sidebar search is enabled.</li> </ul>		
		ty members search for users, glob I <b>ds</b> option selected) query the fol	
	<ul><li>Name</li></ul>		
	<ul><li>Username</li></ul>		
	<ul><li>User ID</li></ul>		
	<ul><li>Body</li></ul>		
	<ul><li>Email</li></ul>		
	<ul><li>Phone</li></ul>		
	<ul><li>Custom fields</li></ul>		
Groups	Groups specific to the current	t community.	

Search Results For	Administrator	Salesforce Community Member	External Community Member (Customer Portal, Partner Portal, Partner Community, or Customer Community license)
Files	Visibility in the current commun  Owned files  Files shared with the user in  Files shared with the entire of the community:  Files posted on accessible re  Salesforce CRM Content libration  Files owned by a user are always user, regardless of how they were	a public or private group community cords and record feeds ry files that the user has access visible in search results for that	Visibility in the current community:  Owned files Files shared with the user in a public or private group Files shared with the entire community Visibility in any community:
Topics	Topics specific to the current cor	mmunity.	
Feeds	Feed posts and comments from Global search returns information information from within the con a user's profile, a record, or a gro must search from within that con	n from all feed contexts. Conte text where the search is perfor up. To find information in a dif	xtual feed search ( ) returns rmed, 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 a	nd in the internal organization.	Users who are members of all communities that the user is

Search Results For	Administrator	Salesforce Community Member	External Community Member (Customer Portal, Partner Portal, Partner Community, or Customer Community license)
			also a member of, and other external users associated with the same external account. Users with partner portal licenses also see the owner of the portal account.
			The Recently Viewed Users list in the lookup shows all users that they have access to via their license, profile settings, permission sets, and sharing rules. If user sharing is enabled in your organization, this behavior varies depending on how it's configured.
			For external community members, enhanced user lookups search within a limited set of fields when the <b>All Fields</b> option is selected.
Lookup searches on records	Full visibility for all items across all communities and your internal organization.	Visibility for all items the user has access to through their user profile or permission sets across all communities and your internal organization.	Visibility for all items the user has access to through their user profile or permission sets across all communities.
Lookup searches in Community Management	Lookups in Community Management and Community Workspaces initially return the items you most recently viewed from within the community. If an object you're looking for isn't in the Recently Viewed Documents list, try typing all or part of the object name and searching again.	No	No

Search Results For	Administrator	Salesforce Community Member	External Community Member (Customer Portal, Partner Portal, Partner Community, or Customer Community license)
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:

Set Up and Manage Salesforce Communities

# **INDEX**

A	Article list component 118
Action Layout	Article Type Filter component 119
customizing 87	Article View component 120
Activity	Articles With This Topic component 122
AppExchange reports and dashboards 360	Ask Button component 123
AppExchange 341, 345	Authentication
AppExchange Package	Communities 94
adoption insights 348	D
communities 344, 380, 385, 389–391	В
	Back Button component 124
community moderation 371 content 363	breadcrumb component 125
	6
Custom Report Type 385, 389	C
custom report types 391	Case Attachments component 125
customization 389	Case Banner component 126
customize 390	Case Comments component 127
Customize 389	Case Comments Publisher component 128
dashboards 355	Case Detail component 129
files 350, 363	Case Feed
filter logic 390	creating portal posts 78
groups 350, 367	Case feed element 130
home reports 356	Case Feed Publisher component 131
insights 350, 352	Case List component 133
licenses 380	Case post visibility 76
members 369	Category Filter component 134
Misc communities reports 378	Category Navigation component 135
moderation insights 351	channel managers 414
new data 391	Chatter
overview reports and dashboards 358	AppExchange 341, 361
Q&A reports and dashboards 372	Communities 341
recommendations 366	edits 361
reports 390	Chatter Answers
reports and dashboards 353–354, 360–363, 365, 367, 369	enabling in Communities 83
Salesforce Org Dashboard 380	Chatter Questions
self-service insights 352	enable in Communities 79
Self-Service reports and dashboards 374	communities
topics 352	Canvas apps in Communities 258
Topics reports and dashboards 377	custom domain 54
unsupported Components 391	custom login behavior with Apex 65
Unsupported Components 345	enable direct messages 80
upgrade 344	feed search 428
Upgrade 345	field service 93
what's new 340	global search 428
without Chatter 341	overview 2
AppExchange Package with Chatter 341	partners 413, 422
Article Content component 117	references 2

communities (continued)	Communities (continued)
search 428	enabling cases for external users 71
set landing tab 55, 98	enabling leads for partner users 420
sidebar search 428	enabling nickname display 50
unauthenticated public pages 106	enabling reputation 333
Visualforce actions 258	end-user experience 424
Visualforce buttons 258	error pages 52
Visualforce links 258	external data sources 268
Visualforce Page component 258	external user passwords 34
Communities	External users
about 1	34
about high-volume community users 20	resetting community passwords 34
actionable Insights 296	file limits 48, 53
activating 44	Force.com sites 102
adding a global search box 54	global header 42, 425
AppExchange 340–341, 344–345, 348–356, 358, 360–363,	Google Analytics 270, 399–410
365–367, 369, 371–372, 374, 377–378, 380, 385, 389–	Insights 292, 295, 302
391	Insights, creating 295
approvals for external users 92	Insights, creating actions 296
authentication 93–94, 97–98	Insights, enabling 294
basic setup 24	Insights, viewing 299
branding 38, 63	knowledgeable people 48
Chatter tab 37	leads 423–424
Community Builder 101	Lightning 5, 355
Community Management 279	Lightning Experience 5
Community Management home dashboard 289	Limits for moderation 321
community workspaces 15	login 62–63
Community Workspaceshome dashboard 289	logout 62, 66–67, 103–104
create record list view 262	maintain 10
creating 26	management 13, 281, 286
creating users 25	manager 283
custom pages 62	managing high-volume users 22
Customer Service (Napili) template 111	members 32
customize 227	merge fields 41
customize self-registration with Apex 69	migrate from sandbox 55
customizing 31	moderating, files 317
customizing with Site.com 102	moderating, mes 317
dashboards 287	moderation 300, 303
dashboards vs Insights 291	moderation content criteria 304
dashboards, create 289	moderation criteria 303
dashboards, cleate 209 dashboards, customize and view 291	moderation execution 312
dashboards, enable and map 288	moderation member criteria 305
deactivating 46	moderation rate rules 310
default roles 16	moderation rules 306–308, 312
description 46	moderation triggers 320
direct messages 48, 82	moderation (riggers 320 moderation, direct messages 318
email 39	_
email notifications 429	moderation, messages 319
enabling 11	moderation, review posts 314 moderator 283, 285
CHADIIIU I I	1110UEIALUI 203, 203

Communities (continued)	Communities (continued)
name 46	super user access for customer users 18
navigating to 425	supported 109
org-wide community settings 16	supported browsers 7
other Salesforce features 71	tabs 35
partner relationship management 411–412	template, changing 47
partner roles 417	template, considerations 47, 233
partner users 416	templates 108, 227
partners 411–412, 414–415, 417–419, 423	tips for using Site.com 102
person accounts 69	topic catalog 327
planning 4	topics 321, 324–326, 328
portals 412	tracking activity 397
preferences 48	types of moderators 284
prerequisites 4	URL 46
previewing 44	user visibility 33
private message 48	Wave Analytics 93
public access 51	who can see what 430
rate limiting 310	Communities Landing page
rate rules 310	custom 105
recommendation audiences 331	Communities login
recommendations 329	authentication providers 64
report options for external users 19	customize 64
reporting 337, 397	SAML 64
reporting for external users 396	single sign-on 64
reports, create 396	Communities Moderation
reputation 331	defining triggers for flagging items 320
reputation calculation 336	Communities Setup
reputation levels 334	choosing between tabs and the Community Builder 36
reputation points 335	Communities users
review and approve content 314	creating 25
Salesforce Knowledge 90	enabling cases for 71
search engine optimization 57, 59–61	enabling leads for 420
security 93–94, 97–98	Community 341
self-registration 62–63, 67, 69, 99	Community Builder
SEO 57, 59–61	add markup 248
set up Chatter Questions 79	audience criteria 249, 251
setting email notifications 429	brand 229
setting up Chatter Answers 83	change content layout 257
setting up Ideas 91	create pages 242
settings 10, 46	create record detail page 264
setup 10	create record list view 262
share groups 23	custom group 249
share record data 262	custom groups 251
share record details 264	delete pages 244
sharing a preview URL 44	device presets 234
Sharing high-volume portal user records 23	edit pages 239
sharing personal contact information 425	export a page 277
statuses 45	export a template 275
super user access 17, 419	external data sources 268

Google Analytics Tracking ID 769 Lightning Bolt solution 271, 273, 275, 277 navigate 28 packaging 271, 275, 277 packaging considerations for Lightning Bolt solutions 273 page export 271, 273, 277 page head 248 page properties 235, 237, 242, 244 page types 237 page variations 249, 251 page visibility 249, 251 Pages menu 235 preview 234 profile-based page visibility 249, 251 public access 245 publish 235 share record data 262 template export 271, 273, 275 theme layout 252, 254 track page views 269 Community users defegating administration 470 Community Workspaces 13, 281 connect Support a Ask Buttons component 137 Contact Support a Ask Buttons component 136 Contact Support and Ask Buttons component 137 Contact Support and Ask Buttons component 136 Contact Support and Ask Buttons component 137 Contact Support and Ask Buttons component 136 Contact Support and Ask Buttons component 137 Contact Support and Ask Buttons component 138 create cases 89 Create Record Button component 138 create case 89 Create Record Button component 140—141 criteria content 304 member 305 Custom Code 217 custom components 142 Custom Record ashboards, create 289 dashboards, create 289 dashboards, customize and view 291 dashboards, creating actions 296 Insights, creating actions 296 Insights, creating actions 296 Insights, viewing 299 Community members updating with the API 34 Community Manager 282 Community with the API 34 Community with the API 34 Community with the API 34 Community well-registration create person accounts 69 Community veel-registration create person accounts 69 Community settings 231 Community settings 231 Community settings 231 Community template 232 considerations 82	Community Builder (continued)	Community Templates
Lightning Bolt solution 271, 273, 275, 277 navigate 228 packaging 271, 275, 277 packaging 271, 273, 277 packaging considerations for Lightning Bolt solutions 273 page export 271, 273, 277 page head 248 page properties 235, 237, 242, 244 page yyes 237 page variations 249, 251 page visibility 249, 251 page visibility 249, 251 page wisibility 249, 251 public access 245 public access 245 share record data 362 template export 271, 273, 275 theme layout type 252, 254 theme layout gas 669 Community Gase Feed 75 Community Gase Feed 75 Community Manager 82 Community manager 84 Insights, creating 205 Insights, creating actions 296 Insights, creating actions 296 Insights, creating actions 296 Insights, creating actions 296 Community members updating with the API 34 Community Moderators 280 Community settings 231 Community	•	
navigate 228 packaging 271, 275, 277 packaging considerations for Lightning Bolt solutions 273 page export 271, 273, 277 page head 248 page properties 235, 237, 242, 244 page types 237 page visibility 249, 251 page visibility 249, 251 Pages visibility 249, 251 preview 234 profile-based page visibility 249, 251 public access 245 public access 246 public access 247 trach page views 269 Community case feed 72, 74–76 Community case feed 72, 74–76 Community Case feed 75 community (Isenses AppExchange 380 Community Managerent insights 346 Community Managers dashboards, create 289 dashboards, create 289 dashboards, create and view 291 dashboards, create 289 dashboards, create 289 dashboards, create 289 dashboards in a page 282 Community More and and map 288 Insights, creating 295 Insights, creating 295 Community members updating with the AP1 34 Community More actions 296 Insights, viewing 299 Community members updating with the AP1 34 Community More actions 296 Community Reputation enabling 333 pashboard ist component 143 Dashboard ist component 144 Dashboards 341 delegated administration community users 420 direct messages considerations 82	e ,	Templates
packaging 271, 275, 277 packaging considerations for Lightning Bolt solutions 273 page export 271, 273, 277 page head 248 page properties 235, 237, 242, 244 page types 237 page variations 249, 251 page visibility 249, 251 preview 234 profile-based page visibility 249, 251 public access 245 publish 235 share record data 262 template export 271, 273, 275 theme layout 252, 254 theme layout 252, 254 theme layout 252, 254 theme layout type 252, 254 track page views 269 Community Case Feed 72, 74–76 Community Licenses AppExchange 380 Community Managers dashboards, create 289 dashboards, creating 295 Insights, enabling 294 Insights, viewing 299 Community members updating with the API 34 Community self-registration create person accounts 69 Community settings 231 Com		·
packaging considerations for Lightning Bolt solutions 273 page export 271, 273, 277 page head 248 page properties 235, 237, 242, 244 page types 237 page variations 249, 251 page variations 249, 251 page variations 249, 251 page wisibility 249, 251 Pages menu 235 preview 234 profile-based page visibility 249, 251 public access 245 publish 235 share record data 262 template export 271, 273, 275 theme layout 252, 254 track page views 269 community Case Feed 75 community Case Feed 75 community Manager 282 community Managers dashboards, customize and view 291 dashboards, creating 295 Insights, creating 295 community Managers updating with the API 34 community welf and man 288 Insights, creating 299 community Mederators 280 community Mederators 280 community Reputation enabling 333 pashboard community self-registration create person accounts 69 community template 232 community		
page export 271, 273, 277 page head 248 page properties 235, 237, 242, 244 page types 237 page visibility 249, 251 Page visibility 249, 251 Page visibility 249, 251 Components 113 Page visibility 249, 251 Pages menu 235 preview 234 proffie-based page visibility 249, 251 publis 235 share record data 262 template export 271, 273, 275 theme layout 752, 254 theme layout 752, 275 community Case Feed 75 Community (ase Fee		
page head 248 page properties 235, 237, 242, 244 page types 237 page types 237 page variations 249, 251 page variations 249, 251 components properties 142 Components 113 page visibility 249, 251 Contact Support and Ask Buttons component 136 preview 234 profile-based page visibility 249, 251 publish 235 share record data 262 template export 271, 273, 275 theme layout 252, 254 theme layout 252, 254 track page views 269 Community case feed 72, 74-76 Community case feed 72, 74-76 Community Case Feed 75 community Jenses AppExchange 380 Community Management Insights 346 Community Managers dashboards, creating 282 Community Managers dashboards, creating 295 Insights, creating actions 296 Insights, creating 295 Insights, creating actions 296 Insights, viewing 299 Community members updating with the API 34 Community self-registration create person accounts 69 Community self-registration create person accounts 69 Community template 232 Community template 232 Community template 232 Considerations 82		,
page properties 235, 237, 242, 244 page types 237 page variations 249, 251 page visibility 249, 251 page visibility 249, 251 Components 113 Page sibility 249, 251 Pages menu 235 preview 234 profile-based page visibility 249, 251 public access 245 publis 235 share record data 262 template export 271, 273, 275 theme layout 252, 254 theme layout 252, 254 track page views 269 Community Case Feed 75 Community Management Insights 346 Community Managers dashboards, create 289 dashboards, creating actions 296 Insights, creating 295 Insights, creating 295 Insights, creating 295 Community mensers updating with the API 34 Community Moderators 280 Community Moderators 280 Community self-registration create person accounts 69 Community template 232 Community template 232 Considerations 296 Identified and minimulation community user sequence contact Support Ask Buttons component 144 community user sequence contact Support Ask Buttons contact Support sequence contact Support Ask Buttons contact Support sequence contact Support Ask Button	, ,	
page types 237 page variations 249, 251 page visibility 249, 251 Pages menu 235 preview 234 profile-based page visibility 249, 251 publis 235 share record data 262 template export 271, 273, 275 theme layout type 252, 254 track page views 269 Community Gase Feed 75 community Managerent Insights 346 Community Managers dashboards, create 289 dashboards, create 289 dashboards, create 289 dashboards, create 289 dashboards, creating actions 296 Insights, creating actions 296 Insights, viewing 299 Community members updating with the API 34 Community Reputation enabling 333 community Reputate 232 Community Reputation enabling 333 community Reputate 232 Community Reputation create person accounts 69 Community reputate 232 Community Reputation create person accounts 69 Community settings 231 Community settings 231 Community template 232 Considerations 82	, •	
page variations 249, 251 page visibility 249, 251 Components 113 Contact Support & Ask Buttons component 136 preview 234 profile-based page visibility 249, 251 public access 245 publish 235 share record data 262 template export 271, 273, 275 theme layout 252, 254 track page views 269 Community Case Feed 72, 74–76 Community Case Feed 72, 74–76 Community Manager 280 Community Managers dashboards, create 289 dashboards, customize and view 291 dashboards, creating 295 Insights, creating 295 Insights, creating 296 Community Moderators 280 Community Moderators 280 Community Moderators 280 Community Noderators 280 Community role 17 community settings 231 Community template 232 Community settings 231 Community template 232 Community were page so considerations 82		
page visibility 249, 251 Pages menu 235 Preview 234 profile-based page visibility 249, 251 public access 245 publish 235 Share record data 262 template export 271, 273, 275 theme layout 252, 254 track page views 269 Community Case Feed 75 Community Case Feed 75 Community Manager 880 Community Manager 880 Community Manager 282 Community Manager 282 Community Managers dashboards, create 289 dashboards, create 289 lnsights, creating 295 Insights, creating 295 Insights, creating 296 Community Mederators 280 Community Replation enabling 333 community settings 231 Community settings 231 Community settings 231 Community template 232 Considerations 26 Community settings 231 Community template 232 Considerations 28 Considerations 26 Considerations 26 Considerations 28 Considerations 28 Considerations 28 Considerations 28 Considerations 28 Community settings 231 Community template 232 Considerations 28		·
Pages menu 235 preview 234 profile-based page visibility 249, 251 public access 245 publish 235 share record data 262 template export 271, 273, 275 theme layout 252, 254 track page views 269 Community Case Feed 75 community Gase Feed 75 community Managers AppExchange 380 Community Managers dashboards, create 289 dashboards, create 289 dashboards, create 289 dashboards, create 289 dashboards, creating actions 296 Insights, creating 294 Insights, viewing 299 Community members updating with the API 34 Community Role 17 community Moderators 280 Community Moderators 280 Community Medrators 280 Community Moderators 280 Community Medrators 280 Community Reputation enabling 333 community recit profile and view 291 community Reputation enabling 333 community report 20 Community settings 231 Community settings 231 Community settings 231 Community template 232 Community template 232 Community template 232 Community template 232 Considerations 82	. •	·
preview 234 profile-based page visibility 249, 251 public access 245 publish 235 share record data 262 template export 271, 273, 275 theme layout type 252, 254 track page views 269 Community Case Feed 72, 74–76 Community General 380 Community Management Insights 346 Community Managers dashboards, create 289 dashboards, create 289 dashboards, create 289 dashboards, creating 295 Insights, reeating actions 296 Insights, viewing 299 Community members updating with the API 34 Community Report and dashboards 381 Community Report and dashboards 385 Community Moderators 280 Community Moderators 280 Community Moderators 280 Community Moderators 280 Community Mederators 280 Community Moderators 280 Community Report 333 community report and dashboards 341 delegated administration create person accounts 69 Community settings 231 Community settings 231 Community template 232 Construction content 404 Content of the API 34 Community of the API 34 Community settings 231 Community settings 231 Community settings 231 Community template 232 Community t		
profile-based page visibility 249, 251 public access 245 publish 235 share record data 262 template export 271, 273, 275 theme layout 252, 254 theme layout 252, 254 track page views 269 Community Case Feed 75 Community Gase Feed 75 Community Managers AppExchange 380 Community Managers dashboards 287 dashboards 287 dashboards, create 289 dashboards, customize and view 291 dashboards, enable and map 288 Insights, creating 295 Insights, reating 294 Insights, viewing 299 Community Reputation enabling 333 community Reputation create person accounts 69 Community setfiregistation create person accounts 69 Community template 232  content criteria 304 Create Case Form component 140 Create Case Form component 140 Create Case Form component 140 Create Case Form component 142 Custom Record Button component 142 Custom Record Button component 142 Custom Record Button cases 89 Customization Content 304 member 305 Custom Case Record Button component 142 Custom Record Button component 143 Dashboard Component 143 Dashboard component 143 Dashboard site component 144 Dashboard site of the criteria 304 Component 144 Dashboards 341 delegated administration community users 420 direct messages considerations 82		
public access 245 publish 235 share record data 262 template export 271, 273, 275 theme layout 252, 254 track page views 269 Community Case feed 72, 74–76 Community Case feed 75 Community Management Insights 346 Community Managers dashboards, create 289 dashboards, customize and view 291 dashboards, customize and view 291 dashboards, creating 295 Insights, viewing 299 Community members updating with the API 34 Community Reputation enabling 333 community rele 17 community reputation create person accounts 69 Community settings 231 Community template 232  Create Case Form component 138 create cases 89 Create Record Button component 140–141 criteria create cases 89 Create Record Button component 140–141 criteria create cases 89 Create Record Button component 140–141 criteria create cases 89 Create Record Button component 140–141 criteria create cases 89 Create Record Button component 140–141 criteria create cases 89 Create Record Button component 142 Content 304 member 305 Custom Code 217 Custom Recommendations 365 Custom Report Type AppExchange 385 customization AppExchange appear and dashboards 389 Customization AppExchange  AppExchange  Dashboard AppExchange reports and dashboards 355 Dashboard component 143 Dashboard syling and dashboards 355 Dashboard syling and dashboards 355 Dashboard domponent 144 Dashboards 341 delegated administration community users 420 direct messages considerations 82	•	
publish 235 share record data 262 template export 271, 273, 275 theme layout 252, 254 theme layout type 252, 254 track page views 269 Community case feed 72, 74–76 Community Case Feed 75 community licenses AppExchange 380 Community Management Insights 346 Community Managers dashboards, create 289 dashboards, create 289 dashboards, customize and view 291 dashboards, creating 295 Insights, creating 295 Insights, creating 296 Insights, viewing 299 Community Moderators 280 Community Moderators 280 Community Menagers updating with the API 34 Community Moderators 280 Community Reputation enabling 333 community role 17 community setfines 231 Community settings 231 Community template 232 Considerations 82		
share record data 262 template export 271, 273, 275 theme layout 252, 254 theme layout type 252 Custom Report Type AppExchange 385 customization AppExchange appear and dashboards 389 customization AppExchange lasights, creating 295 lasights, creating 295 lasights, reating 294 lasights, viewing 299 Community members updating with the API 34 Community Moderators 280 Community Moderators 280 Community Moderators 280 Community Reputation enabling 333 community Reputation enabling 333 community replate 27 community settings 231 Community settings 231 Community template 232 considerations 82	•	·
template export 271, 273, 275 theme layout 252, 254 theme layout type 252, 254 track page views 269 Community case feed 72, 74–76 Community Case Feed 75 Community (Case Feed 75 Coustom Recommendations 365 Custom Report Type AppExchange 385 Customization AppExchange 390 report columns 390 AppExchange package 389 reports and dashboards 389 Customization AppExchange package 389 reports and dashboards 389 Customization AppExchange Insights, creating 295 Insights, creating 295 Insights, creating actions 296 Insights, creating actions 296 Insights, viewing 299 Community members Updating with the API 34 Community Moderators 280 Community Moderators 280 Community Reputation enabling 333 Community Reputation enabling 333 Community reports and dashboards 355 Dashboard component 143 Dashboard component 144 Dashboards 341 delegated administration community users 420 Community template 231 Community template 232 Community template 232 Community template 232 Community template 232 Content 304 member 305 Custom Code 217 custom Cade 20 Coustom Report Type AppExchange sabs Custom Report Type AppExchange sabs C	•	
theme layout 252, 254 theme layout type 252, 254 theme layout type 252, 254 track page views 269 Community case feed 72, 74–76 Community Case Feed 75 Community Case Feed 75 Community licenses AppExchange 380 Community Management Insights 346 Community Managers Community Managers  dashboards 287 dashboards, create 289 dashboards, create 289 lnsights, creating 295 lnsights, viewing 299 Community members updating with the API 34 Community Menagers  Community Menagers  Dashboard Community Moderators 280 Community Menagers  Dashboard Community Mederators 280 Community Mederators 280 Community Reputation enabling 333 community reli 17 community self-registration create person accounts 69 Community settings 231 Community template 232  considerations 82		·
theme layout type 252, 254 track page views 269  Community case feed 72, 74–76  Community Case Feed 75 Community licenses AppExchange 380  Community Management Insights 346  Community Manager 282 Community Managers dashboards 287 dashboards, create 289 dashboards, customize and view 291 dashboards, creating 295 Insights, creating 295 Insights, viewing 299  Community members updating with the API 34  Community Molerators 280  Community Molerators 280  Community Menager 80  Custom Report Type AppExchange 385  Customization AppExchange 390 report columns 390 AppExchange package 389 reports and dashboards 389  Customization AppExchange  AppExchange  AppExchange  AppExchange  Dust 389 Losights, creating 295 Date 389 Customize pages 103  D  D  D  D  D  D  D  D  D  D  D  D  D	•	
track page views 269 Community case feed 72, 74–76 Community Case Feed 75 Community Gase Feed 75 Community licenses AppExchange 380 Community Management Insights 346 Community Managers Community Managers AppExchange 282 Community Managers AppExchange package 389 AppExchange AppExch	· · · · · · · · · · · · · · · · · · ·	
Community case feed 72, 74–76 Community Case Feed 75 Community licenses AppExchange 380 Community Management Insights 346 Community Managers dashboards 287 dashboards, create 289 dashboards, creating 295 Insights, creating actions 296 Insights, viewing 299 Community members updating with the API 34 Community Moderators 280 Community Moderators 280 Community Meputation enabling 333 community Mepeta 232 Community seff-registration create person accounts 69 Community seff-registration create person accounts 69 Community seff-registration create person accounts 69 Custom Report Type AppExchange 385 Custom Report Type AppExchange 385 Customization AppExchange ago 7 AppExchange package 389 reports and dashboards 389 Customization AppExchange AppExchange ago 9 Customization AppExchange AppExchange ago 9 Customize pages 103 Dashboard AppExchange reports and dashboards 355 Dashboard component 143 Dashboard sylvation community seff-registration create person accounts 69 Community settings 231 Community template 232 Considerations 82		
Community Case Feed 75 community licenses	. •	
Community licenses AppExchange 380 Community Management Insights 346 Community Manager 282 Community Managers dashboards 287 dashboards, create 289 dashboards, customize and view 291 dashboards, creating 295 Insights, creating 295 Insights, creating 294 Insights, viewing 299 Community members updating with the API 34 Community Moderators 280 Community Moderators 280 Community Reputation enabling 333 community role 17 community self-registration create person accounts 69 Community setlings 231 Community template 232  Customization AppExchange package 389 reports and dashboards 389 Customization AppExchange  Sa89 Customize pages 103  Dushboard AppExchange reports and dashboards 355 Dashboard AppExchange reports and dashboards 355 Dashboard component 143 Dashboard s341 delegated administration community self-registration community se	· · · · · · · · · · · · · · · · · · ·	custom components 142
AppExchange 380  Community Management Insights 346  Community Manager 282  Community Managers dashboards 287 dashboards, create 289 dashboards, customize and view 291 dashboards, creating 295 Insights, creating 295 Insights, enabling 294 Insights, viewing 299  Community members updating with the API 34  Community Moderators 280  Community Reputation enabling 333 community role 17 community self-registration create person accounts 69  Customization AppExchange Customization AppExchange  AppExchange  Sa89 Customization AppExchange  Customization  AppExchange  Customization  AppExchange  Customization  AppExchange  Customization  AppExchange  Date 389  customize pages 103  Dashboard AppExchange reports and dashboards 355  Dashboard component 143 Dashboard component 143 Dashboard s341 delegated administration create person accounts 69  Community settings 231 Community template 232  Community template 232  Community template 232  Considerations 82	Community Case Feed 75	Custom Recommendations 365
Community Management Insights 346 Community Manager 282 Community Managers dashboards 287 dashboards, create 289 dashboards, customize and view 291 dashboards, enable and map 288 Insights, creating 295 Insights, enabling 294 Insights, viewing 299 Community members updating with the API 34 Community Moderators 280 Community Reputation enabling 333 community role 17 community self-registration create person accounts 69 Community template 232  customization AppExchange reports and dashboards 389 Customization AppExchange  as9 Customization AppExchange customize pages 103  Dashboard AppExchange reports and dashboards 355 Dashboard AppExchange reports and dashboards 355 Dashboard component 143 Dashboard s341 delegated administration community users 420 direct messages considerations 82	community licenses	Custom Report Type
Insights 346 Community Manager 282 Community Managers	AppExchange 380	AppExchange 385
Community Manager 282 Community Managers	Community Management	customization
Community Managers  dashboards 287  dashboards, create 289  dashboards, customize and view 291  dashboards, enable and map 288  lnsights, creating 295  lnsights, enabling 294  lnsights, viewing 299  Community members  updating with the API 34  Community Moderators 280  Community Reputation  enabling 333  community role 17  community self-registration  create person accounts 69  Community template 232  RappExchange  report columns 390  AppExchange package 389  reports and dashboards 389  Customization  AppExchange  customize pages 103  D  D  D  D  D  D  D  D  D  D  D  D  D	Insights 346	AppExchange
dashboards 287     dashboards, create 289     dashboards, customize and view 291     dashboards, enable and map 288     lnsights, creating 295     lnsights, creating actions 296     lnsights, viewing 299     Community members     updating with the API 34     Community Reputation     enabling 333     community role 17     community self-registration     create person accounts 69     Community settings 231     Community template 232     AppExchange package 389     reports and dashboards 389     Customization     AppExchange     Date 389     customize pages 103     Dashboard     AppExchange reports and dashboards 355     Dashboard     AppExchange reports and dashboards 355     Dashboard component 143     Dashboard list component 144     Dashboards 341     delegated administration     community settings 231     direct messages     considerations 82	Community Manager 282	390
dashboards, create 289     dashboards, customize and view 291     dashboards, enable and map 288     Insights, creating 295     Insights, creating 294     Insights, viewing 299 Community members     updating with the API 34 Community Reputation     enabling 333     community role 17     community self-registration     create person accounts 69 Community template 232  reports and dashboards 389 Customization     AppExchange     customize pages 103  Dashboard AppExchange reports and dashboards 355 Dashboard AppExchange reports and dashboards 355 Dashboard component 143 Dashboard s341 delegated administration     community self-registration     community settings 231 Community template 232  considerations 82	Community Managers	report columns 390
dashboards, customize and view 291 dashboards, enable and map 288 Insights, creating 295 Insights, creating actions 296 Insights, enabling 294 Insights, viewing 299 Community members updating with the API 34 Community Moderators 280 Community Reputation enabling 333 community role 17 community self-registration create person accounts 69 Community settings 231 Community template 232  Customization AppExchange  D Dashboard AppExchange reports and dashboards 355 Dashboard component 143 Dashboard s 341 delegated administration community users 420 direct messages considerations 82	dashboards 287	AppExchange package 389
dashboards, enable and map 288 Insights, creating 295 Insights, creating actions 296 Insights, enabling 294 Insights, viewing 299 Community members Updating with the API 34 Community Moderators 280 Community Reputation Enabling 333 Community role 17 Community self-registration Create person accounts 69 Community settings 231 Community template 232  AppExchange Customize pages 103 Dashboard AppExchange reports and dashboards 355 Dashboard component 143 Dashboard list component 144 Dashboards 341 delegated administration Community settings 231 direct messages Considerations 82	dashboards, create 289	reports and dashboards 389
Insights, creating 295 Insights, creating actions 296 Insights, enabling 294 Insights, viewing 299 Community members Updating with the API 34 Community Moderators 280 Community Reputation Enabling 333 Enablogard Community role 17 Community role 17 Community self-registration Create person accounts 69 Community settings 231 Community template 232  Date 389 Customize pages 103  Dashboard AppExchange reports and dashboards 355 Dashboard AppExchange reports and dashboards 355 Dashboard component 143 Dashboard list component 144 Dashboards 341 delegated administration Community self-registration Community settings 231 Community template 232  Considerations 82	dashboards, customize and view 291	Customization
Insights, creating 295 Insights, creating actions 296 Insights, enabling 294 Insights, viewing 299 Community members Updating with the API 34 Community Moderators 280 Community Reputation Enabling 333 Enablogard Community role 17 Community role 17 Community self-registration Create person accounts 69 Community settings 231 Community template 232  Date 389 Customize pages 103  Dashboard AppExchange reports and dashboards 355 Dashboard AppExchange reports and dashboards 355 Dashboard component 143 Dashboard list component 144 Dashboards 341 delegated administration Community self-registration Community settings 231 Community template 232  Considerations 82	dashboards, enable and map 288	AppExchange
Insights, creating actions 296 Insights, enabling 294 Insights, viewing 299 Community members Updating with the API 34 Community Moderators 280 Community Reputation Enabling 333 Enabling 333 Enabling 334 Community role 17 Community self-registration Create person accounts 69 Community settings 231 Community template 232  Date 389 Customize pages 103  Dashboard AppExchange reports and dashboards 355 Dashboard component 143 Dashboard list component 144 Dashboards 341 delegated administration Community self-registration Community settings 231 Community template 232  Considerations 82	·	
Insights, enabling 294 Insights, viewing 299 Community members Updating with the API 34 Community Moderators 280 Community Reputation Enabling 333 Enabling 333 Enabling 333 Enabling 334 Community role 17 Enabling 335 Community self-registration Create person accounts 69 Community settings 231 Community template 232 Community template 232  Customize pages 103  Dashboard  AppExchange reports and dashboards 355  Dashboard component 143 Dashboard list component 144 Dashboards 341 delegated administration Community users 420 direct messages Considerations 82	•	
Insights, viewing 299 Community members     updating with the API 34 Community Moderators 280 Community Reputation     enabling 333     enabling 373 Community role 17 Community self-registration     create person accounts 69 Community settings 231 Community template 232  Dashboard AppExchange reports and dashboards 355 Dashboard component 143 Dashboard list component 144 Dashboards 341 delegated administration     community users 420 direct messages Considerations 82	The state of the s	
Community members  updating with the API 34  Community Moderators 280  Community Reputation enabling 333 enabling 17  community role 17  community self-registration create person accounts 69  Community settings 231  Community template 232  Dashboard AppExchange reports and dashboards 355  Dashboard component 143  Dashboard list component 144  Dashboards 341  delegated administration community users 420  direct messages considerations 82	3 1	
updating with the API 34  Community Moderators 280  Community Reputation enabling 333  community role 17  community self-registration create person accounts 69  Community settings 231  Community template 232  Dashboard AppExchange reports and dashboards 355  Dashboard component 143  Dashboard list component 144  Dashboards 341  delegated administration community users 420  direct messages considerations 82	3 1	D
Community Moderators 280  Community Reputation  enabling 333  community role 17  community self-registration  create person accounts 69  Community settings 231  Community template 232  AppExchange reports and dashboards 355  Dashboard component 143  Dashboard list component 144  Dashboards 341  delegated administration  community users 420  direct messages  considerations 82	•	Dashboard
Community Reputation     enabling 333     Dashboard component 143     community role 17     Dashboards 341     community self-registration     create person accounts 69     Community settings 231     Community template 232     Community template 232     Dashboard component 144     Dashboard satisfied component 144     Dashboard satisfied component 144     Dashboard satisfied component 143     Dashboard component 143     Dashboard component 143     Dashboard component 144     Dashboard satisfied component 144     Dashboard component 144     Dashboard satisfied component 144     Dashboard component 144     Community self-registration component 144     Co		
enabling 333  Dashboard list component 144  Dashboards 341  community self-registration create person accounts 69  Community settings 231  Community template 232  Dashboard list component 144  Dashboards 341  delegated administration community users 420  direct messages considerations 82		
community role 17  community self-registration  create person accounts 69  Community settings 231  Community template 232  Dashboards 341  delegated administration  community users 420  direct messages  considerations 82		•
community self-registration create person accounts 69  Community settings 231  Community template 232  delegated administration community users 420  direct messages considerations 82	-	•
create person accounts 69 community users 420 Community settings 231 direct messages Community template 232 considerations 82		
Community settings 231 direct messages Community template 232 considerations 82		-
Community template 232 considerations 82	·	•
	•	_
moderation 218	Community template 252	moderation 318

direct messages in communities	Google Analytics (continued)
enable 80	User Flow 410
г	Google Analytics for Salesforce Communities
E	Contact Support Page Activity report 404
Email notifications	enable 401
Communities 429	install 402
Employee Login Link component 218	overview 400
error message 240	Page Views 408–409
Escalate Question to Case 86	Page Views by New and Returning Users 405
Escalate to Case	Page Views by Salesforce Object 405
access 87	Page Views by User Type 406
Expanded Category Navigation component 144	Search Activity 407–408
	setup 401
F	User Flow 410
Featured Data Categories component 146	Group Banner component 159
Featured Search component 147	Group component 158
Featured Topic component 149	Group Detail component 160
Featured Topics and Feeds component 163	Group Related List component 161
Feed Compact component 151	groups
Feed component 150	AppExchange reports and dashboards 353–354, 367
Feed Post & Comments component 152	insights 350, 352
Feed Publisher component 153	groups in communities 265
file limits	Guest user profile 231
Communities 53	
files	Н
AppExchange 363	Headline component 162
Dashboards 363	High-Volume Community Users
Files list component 156	granting access to records 22
Filter Logic	managing users 22
AppExchange	sharing records 23
390	sharing sets 22
reports 390	High-volume portal users
Follow Button component 156	sharing records or users 19
Forgot Password component 219	home reports
	AppExchange reports and dashboards 356
G	
Global Header	
for Communities 42	Ideas
Global Search Results Component 157	enabling in Communities 91
Google Analytics	Incremental search 149
communities 400–410	Insights
Contact Support Page Activity report 404	actions 296
dashboards 407	AppExchange 349
Page Views by New and Returning Users report 405	Communities 349
Page Views by Salesforce Object report 405	create 295
Page Views by User Type report 406	customize 299
Page Views dashboard 408–409	view 299
Search Activity dashboard 408	
Search Activity report 407	

K	Page Views by Salesforce Object 405
	Page Views by User Type 406
knowledgeable people component 165	partner accounts
T.	disable 416
D: 1	partner communities
Language Picker component 165	before setup 413
Lightning Bolt solution 271, 273, 275, 277	prep your org 413
Lightning communities 5	Partner Communities
Lightning Partner Management 422	disable partner accounts 416
Login Fields 220	partner community
Login page	calendar 424
branding 216	events 424
Login page content component 216	lead assignment 423
٨٨	sharing rules 418
M	tasks 424
Manager	Partner Community
Communities 283	cases 423
member criteria 305	set up 411–412
members 17	partner portals
Members	migration 412
AppExchange reports and dashboards 369	partner user profiles 417
Message Notification component 167	partner users
Moderating	create 416
Communities 303	partners
Moderation	communities 422
AppExchange reports and dashboards 371	roles 417
Moderator	Path component 171
Communities 285	Pre-moderation
Moderators	review and approve posts 314
direct messages 318	Process Builder 88
managing files 317	Profile Header component 171
managing flagged items 315	Profile, quest user 231
managing messages 319	Frome, guest user 251
	Q
N	Q&A
Navigation 216–217	AppExchange reports and dashboards 372
Navigation Bar 167	Question from Chatter 86
Navigation Menu component 168	Question from Charlet 80  Question-to-Case
New Message Button 170	
nicknames	enabling 85
enabling 50	processes 88 workflows 88
5	
0	Queues 88
objects 109	R
Overview	
AppExchange reports and dashboards 358	recent messages 167
Appending reports and dashboards 330	Recommendations
P	AppExchange 365–366
Page Views 408–409	FAQ 366
Page Views by New and Returning Users 405	Recommendations component 173
rage views by New and netalling Users 403	

Record Banner component 174	Sharing
Record Detail component 175	high-volume community user records 23
Record Information Tabs component 176	Sharing sets
Record List component 178	creating 22
Record Related List component 180	editing 22
Related Articles List component 180	overview 19
Related Questions List component 181	Site.com
Related Topics List component 182	tips for Communities 102
Report	using with Communities 102
AppExchange 390	Social Login 224
Groupings 390	super user access
Report Chart component 183	assign to partner user 419
Report list component 183	revoke from partner user 419
Report Summary component 184	т
Reports 341	Т
Reports and Dashboards 345	Tabs component 194
Rich Content Editor component 186	Template, updating 232
C	Toggle Button component 195
S	Topic Catalog component 196
Salesforce Communities Management package	Topic Description component 197
install 338	Topic Metrics component 198
upgrade 338	Topics
Salesforce CPQ (Steelbrick) 215	adding to articles 328
Salesforce Knowledge	AppExchange reports and dashboards 377
Communities 90	merging 324
Salesforce1	translate
recommendation audiences 331	translation 328
recommendations in feed 329	Trending Articles by Topic component 200
Scroll to profile area 187	Trending Articles component 199
Search Activity 407–408	trending topics component 184, 201
Search and Post Publisher component 189	1.1
Search component 188	U
Search in Communities	Unanswered Questions component 202
AppExchange reports and dashboards 362	Upgrade
Search Results component 192	AppExchange 344
Self Registration 222	User Flow 410
Self-Service Self-Service	User Profile Detail component 204
AppExchange reports and dashboards 374	User Profile Image component 205
self-service insights	User Profile Knows About component 206
AppExchange report 352	User Profile Related List component 207
send direct messages 170	User Profile Stats component 208
SEO	User Profile Summary component 209
Communities 57, 59–61	User Profile Tabs components 211
service not available 103	User Record Home component 202
Set Case Status Button component 193	User Settings component 213
Settings area 231	M
Share groups	V
Communities 23	Visualforce Page component 215



Wave Analytics

Wave Analytics (continued)
Communities 93