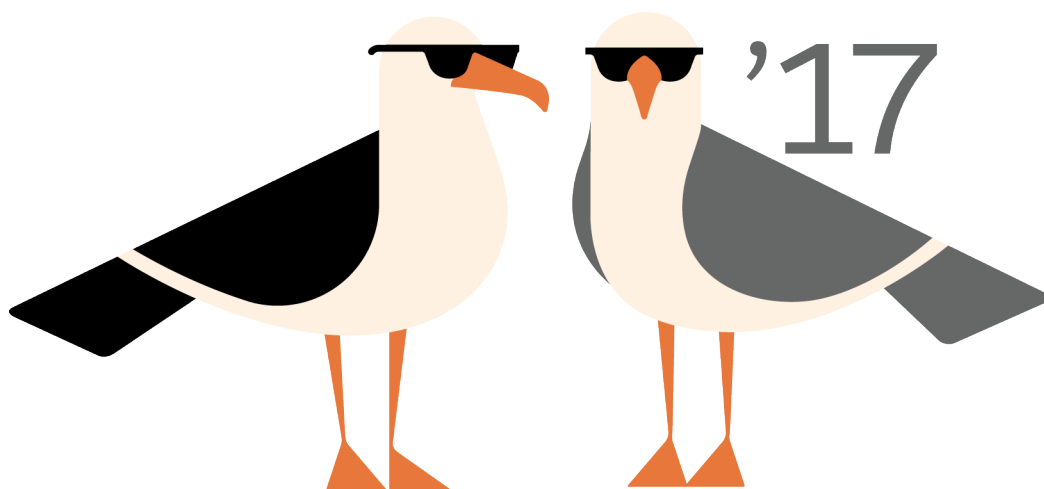


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# Set Up and Manage Salesforce Communities

Salesforce, Summer '17





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# 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.

Communities live inside your org and can be easily accessed from the App Launcher in Lightning Experience or the global header in Salesforce Classic.

## EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

## 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.

### [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 responsive communities for delivering rich, branded spaces for your customers and partners.

### [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.

### [Analyze and Improve Community Performance \(Developer Preview\)](#)

The Salesforce Community Page Optimizer analyzes your community and identifies issues that impact performance. Use the information to refine your design and improve community performance for your members. The Page Optimizer is a free plug-in available from the Chrome Web Store. Download and install the plug-in as you would any Chrome extension.

### [Community Migration, Packaging, and Distribution](#)

You can migrate your community between related orgs, such as your sandbox and production org, using change sets. And with managed packages, you can distribute customized Lightning Bolt solutions or pages to other Salesforce users and orgs, including people outside your company.

[Connect Your Content Management System to Your Community \(Beta\)](#)

Do you have a website built in a Content Management System (CMS) such as Adobe Experience Manager? You can connect your CMS content to your community for consistent branding and ease of maintenance.

[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.

[Communities Resources](#)

## SEE ALSO:

[Plan Your Implementation](#)[Enable Salesforce Communities](#)[Create Communities](#)[Manage Your Community](#)[Communities Resources](#)

## Salesforce Communities Overview

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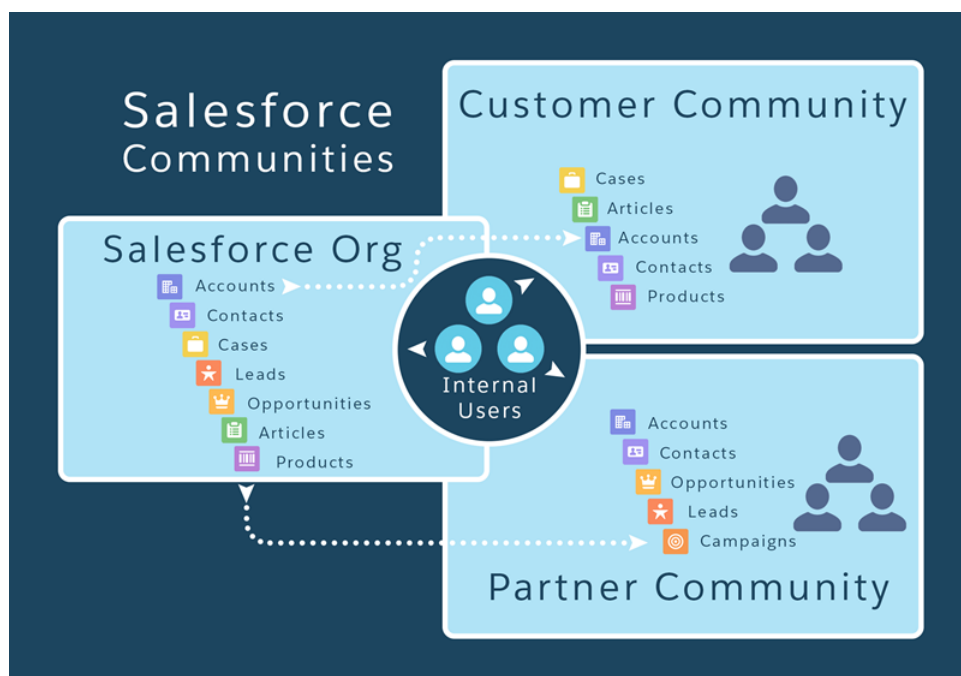
Communities are a great way to share information and collaborate with people outside your company who are key to your business processes, such as customers or partners. Use easy point-and-click branding tools with Lightning templates or go with the Visualforce to create branded collaboration spaces.

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™ for Salesforce Communities Package](#)
- [SEO Best Practices](#)

## Limitations, Supported Browsers, Mobility

- [Communities Limits](#)
- [Browser Support 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 Use 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.

#### [Browser Support for Communities](#)

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

#### [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.

#### [Lightning Communities Limitations](#)

Be aware of the limitations that apply to Lightning Communities such as Customer Service (Napili) and Partner Central.

## 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:
  - **Lightning Communities:** Community Builder comes with rich, responsive templates for communities targeted at customer support scenarios. Templates offer easy customization via an intuitive GUI and allow for a quick rollout of your community with minimal configuration in Site.com. This option doesn't require programming experience or knowledge of the Force.com platform. Need help deciding on a template? Check out the [template comparison](#).
  - **Visualforce + Salesforce Tabs:** Communities comes with some out-of-the-box branding themes that you can use along with standard Salesforce tabs in your community. In addition, you can use Visualforce to extensively customize your community's appearance and leverage all the capabilities of the Force.com platform. This option requires programming capabilities.
- Determine if any of the [community limits](#) will affect your implementation.

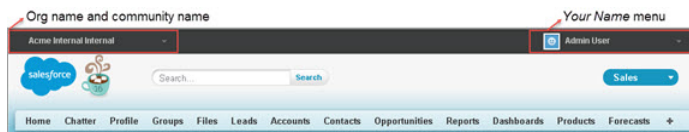
SEE ALSO:

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

## 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 Use 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.

### 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 Lightning apps visually, without code, using standard and custom Lightning components. You can make your Lightning components available in the Lightning App Builder, so administrators can build custom user interfaces without code.

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

- **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 Customer Service (Napili), Partner Central, 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, such as Customer Service (Napili), Partner Central, 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.

 **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! You don't need to enable Lightning Experience to use Lightning communities, such as Customer Service (Napili), Partner Central, and Lightning Bolt solutions. Lightning communities 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 Salesforce Tabs + Visualforce community uses Visualforce and the Force.com technology under the hood. 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, create a community with a 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



**Note:** To switch between your org and communities in Lightning Experience orgs, use the App Launcher.

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



**Note:** Most of the Communities functionality that is not supported in Lightning Experience affects only Salesforce admins, which doesn't prevent you from enabling Lightning Experience in your org. You can always enable Lightning Experience for most profiles in your Salesforce org, and give the System Admin profile the option to switch to Salesforce Classic.

## Browser Support for Communities

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

### Salesforce Tabs + Visualforce

Salesforce Tabs + Visualforce communities are supported on all desktop browsers supported by Salesforce. These communities are also [accessible from Salesforce1 apps](#).

### Lightning Communities

Lightning communities, such as Customer Service (Napili), Partner Central, and Aloha, are supported on the following browsers.

#### On Desktop Computers

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

#### On Mobile Devices

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

#### EDITIONS

Available in: Salesforce  
Classic and Lightning  
Experience

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

Platforms	Apple Safari (Latest Version)	Google Chrome™ (Latest Version)	Microsoft® Internet Explorer® 11	Microsoft® Edge (Windows® 10 only)	Mozilla® Firefox® (Latest Version)
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.

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

## Grant the Necessary Permissions

Make sure that community members can access Salesforce1:

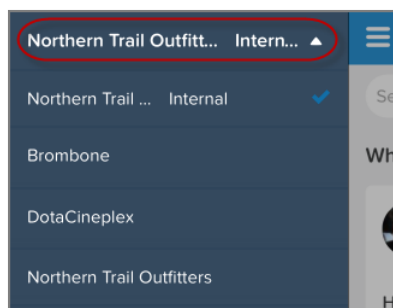
- Verify that Salesforce1 is enabled for your org (default) or enable it. From Setup, enter *Salesforce1* in the **Quick Find** box, then select **Salesforce1 Settings**.
- Set up access to the Salesforce1 mobile browser app for external users in your community. On each external user record, select **Salesforce1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

## Salesforce Tabs + Visualforce Communities

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
<b>Users with standard Salesforce licenses</b>  Internal org users who are also in a community	Log in to Salesforce from a supported mobile browser. Then use the switcher at the top of the Salesforce1 navigation menu and select a community.	Log in to the app. Use the switcher at the top of the Salesforce1 navigation menu and select a community.	Log in to the app. Use the switcher at the top of the Salesforce1 navigation menu and select a community.
<b>External users with the following community licenses:</b> <ul style="list-style-type: none"> <li>• Customer Community</li> <li>• Customer Community Plus</li> <li>• Partner Community</li> <li>• Customer Portal</li> <li>• Partner Portal</li> <li>• High-Volume Portal User</li> </ul>	Navigate to the community URL and log in with the community credentials. If the community URL doesn't contain <code>one/one.app</code> , append it to the URL.	On the Salesforce1 login screen, tap . Add the community as a new connection, using the community URL for the host name: <code>(&lt;domainname&gt;.force.com/&lt;path-prefix&gt;)</code> . Then, select the community connection and log in with the community credentials.	On the Salesforce1 login screen, tap . Add the community as a new connection, using the community URL for the host name: <code>(&lt;domainname&gt;.force.com/&lt;path-prefix&gt;)</code> . Then, select the community connection and log in with the community credentials.
<b>Unlicensed users (also known as guest users)</b>	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

## Lightning Communities

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

## Community Management, Community Workspaces, and Community Builder

Community Management and Community Workspaces aren't available in Salesforce1. 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:

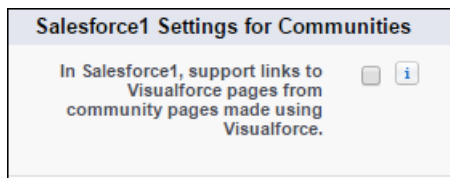
[Salesforce1 Settings for Communities](#)

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.

## Lightning Communities Limitations

Be aware of the limitations that apply to Lightning Communities such as Customer Service (Napili) and Partner Central.

### General Limitations

- Lookup fields aren't supported for custom objects or in template-based communities created before Spring '16.
- In multilingual communities, the login page for the community appears in the default language for the community. To create login pages in other languages, use custom Visualforce pages.
- Google reCAPTCHA only works when access to Google web traffic is allowed. Causes for these disruptions vary, and can include network outages or government-mandated blocks. If a large percentage of your community is blocked from Google web traffic, consider requiring users to log in to post to the community.
- The Create New option for lookups isn't supported in Customer Service (Napili) communities. Also, only external users (not guest users) can access asset lookup fields.
- Article smart links (links from one article to another) aren't supported.
- For templates that use data categories, like Koa and Kokua, only one category group can be active at a time. Each group can have a maximum of five hierarchy levels in each group.
- For guest users, case validation doesn't run when cases are submitted through the Contact Support component. Validation runs once the submission is processed in the queue. Salesforce recommends writing custom client-side validation or writing custom Apex before inserting triggers to sanitize the case content.

### Partner Communities

- Partner Central doesn't support the following features:
  - Direct messages
  - Quotes, contracts, and orders

### 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

- Language picker
- To protect your sales data, we disable guest user access for the navigation menu in Partner Central by default.
- Partner Central doesn't provide out-of-the-box self-service customer support features, such as navigational topics, articles, and the search publisher. To extend support to your partners, consider exposing cases in your community and creating a quick action button for creating cases.
- You can't export communities built on Partner Central as Lightning Bolt solutions. You can export individual pages, but not the entire community.


### Browser Limitations

- Mobile devices using the BlackBerry or Microsoft Windows operating systems aren't supported.
- Internet Explorer versions before 11 aren't supported. We've created a page that automatically lets your users know that they need to either upgrade or use a newer browser.

You can also redirect to your own page that informs users that those browsers aren't supported. Create a file such as *ieRedirect.js* and include it in the header script section of the Site.com page. The file should contain the following code:

```
if (window.attachEvent && !window.addEventListener) {
  window.location = '<your redirect page>';
}
```

- Only the latest versions of Chrome, Firefox, and Safari (on Mac OS) are supported.

 **Note:** For the list of Salesforce supported browsers, see the section on supported browsers in the Salesforce online help.

## 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.

 **Note:** When 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 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 might not be enabled for your Salesforce org. Contact your Salesforce account executive.

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

We suggest that you use something recognizable to your users, such as your company name. Although the domain name is the same for all communities, you create a unique URL for each community during the creation process. For example, if your domain is `UniversalTelco.force.com` and you're creating a customer community, you can designate the URL as `UniversalTelco.force.com/customers`.

 **Important:** You can't change the domain name after you save it.

You can designate a 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**.

If you have the Create and Set Up Communities permission, you can now [create communities](#).

- In Lightning communities and Lightning Experience, the App Launcher lets members switch between their Salesforce org and communities that they're a member of. By default, the App Launcher is hidden in existing communities and displayed in new communities.
- In Salesforce Tabs + Visualforce communities and Salesforce Classic, the global header lets users switch between their Salesforce org and communities that they're a member of.

### SEE ALSO:

[Who Can See What in Communities](#)

[Enable the Global Header for Communities](#)

[Enable the App Launcher in Lightning Communities](#)

### 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](#)

## 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 **Administration Preferences** 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.

### CMS Connect (Beta)

Connect your Content Management System (CMS) to your community. Dynamically render headers, footers, banners, CSS, JavaScript, and other content from Adobe Experience Manager on your community pages.

### Administration

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

- [Members](#)—Add or remove members by profiles.

### 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

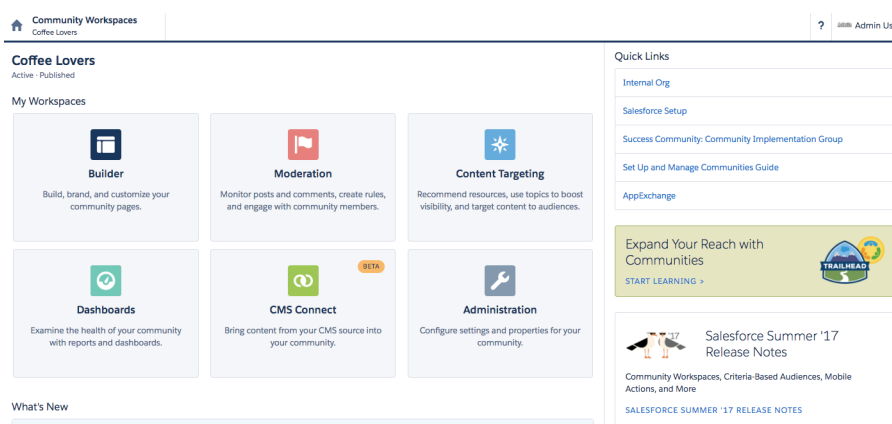
- [Tabs](#)—Select the tabs you want members to see in communities built using the Salesforce Tabs + Visualforce template.
  - [Branding](#)—Select an out-of-box branding theme for communities built using the Salesforce Tabs + Visualforce template.
  - [Login & Registration](#)—Select the default community login and self-registration pages, or manage custom pages.
  - [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 370—Set up reputation levels and points to reward members for activity in the community feed.
-  **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.

1. 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 **Workspaces** next to its name.

### Example:



### 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

## 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.

#### [Allow Customers to Change Case Statuses](#)

Let customer users change case statuses in communities. This functionality is available only for users with the Customer Community Plus license.

#### [About High-Volume Community Users](#)

High-volume community users are limited-access users intended for orgs that have thousands to millions of communities users.

#### [Grant High-Volume Community Users Access to Records](#)

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

#### [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.

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

## 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.

 **Note:** For better performance, we recommend setting this value to **1**. You can then use Super User Access to grant specific users access to data owned by other users in their account.

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

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

SEE ALSO:

[Enable Super User Access for Your 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.

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

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](#)

### 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.

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

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.

### 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**.

### 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](#)

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.

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

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

### EDITIONS

Salesforce Communities available in: Salesforce Classic

Salesforce Communities Setup available in: Salesforce Classic and Lightning Experience

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

### USER PERMISSIONS

To enable report options for external users:

- Customize Application

## Allow Customers to Change Case Statuses

Let customer users change case statuses in communities. This functionality is available only for users with the Customer Community Plus license.

1. From Setup, enter *Communities Settings* in the Quick Find box, then select **Communities Settings**.
2. Select **Allow customer users to change case statuses**.
3. 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

## 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:

- 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](#).

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

## 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

### 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

- Custom objects that don't have an account or contact lookup field

7. In the Configure Access section, click **Set Up** or **Edit** next to an object name to configure access for the selected profiles, or click **Del** to remove access settings for an object.



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

8. Grant access based on an account or contact lookup:

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

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



**Note:** Both selected fields must point to either an account or contact. For example, `Contact.Account` and `Entitlement.Account` both point to an account.

9. Choose an access level of Read Only or Read/Write. (If the object's organization-wide sharing setting is Public Read Only, then only Read/Write is available.)
10. Click **Update**, then click **Save**.

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

SEE ALSO:

[About High-Volume Community Users](#)

## Share Records Owned By High-Volume Community Users

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

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

Share groups apply across communities.

To set up share groups for your communities:

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

### 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](#)



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

5. Click **Edit** to add users to the share group. You can add both internal users from your organization as well as external users from the same parent account as the high-volume user.
  - a. From the **Search** drop-down list, select the type of member to add.
  - b. If you don't see the member you want to add, enter keywords in the search box and click **Find**.
  - c. Select members from the Available Members box, and click **Add** to add them to the group.
  - d. Click **Save**.

#### SEE ALSO:

[About High-Volume Community Users](#)

[Grant High-Volume Community Users Access to Records](#)

## Community Setup Basics

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 Notifications in Lightning Communities](#)

With Global Notifications, your members receive messages wherever they are working, whether in their communities or in their apps. Members receive notifications on any screen—mobile, tablet, and desktop. This functionality is available in communities based on Customer Service (Napili), Partner Central, and any Lightning Bolt solutions.

##### [Enable the App Launcher in Lightning Communities](#)

Display the App Launcher in Lightning communities to make it easy for members to move between their communities and their Salesforce org. This functionality is available in communities based on Customer Service (Napili), Partner Central, and any Lightning Bolt solutions.

##### [Enable the Global Header for Communities](#)

In Salesforce Tabs + Visualforce communities and Salesforce Classic, the global header lets you switch between your communities and your Salesforce org.

##### [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.

#### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

[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 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. Search Engine Optimization (SEO) can significantly improve discovery for public communities.

## 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 partner users.
1. On the account record, view or add the contact record for the person you want to add to a community.
  2. 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.

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.

### USER PERMISSIONS

To create or edit partner users:


- **Manage External Users**

To create or edit 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 create, edit, and delete profiles:

- **"Manage Profiles and Permission Sets"**

To log in as an external user:

- **Manage Users**

AND

**Edit on Accounts**

- 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.
- Community Users can't own community-enabled accounts.
- 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](#)

[Upgrade Community User Licenses](#)

[Partner User Roles](#)

[Customize Email Sent from Communities](#)

## Upgrade Community User Licenses

Upgrading a community or portal user's license allows you to give them access to more data within your community. With the right combination of permissions via the user's new license, profile, role, and permission sets, you can preserve the user's record and Chatter history.

Before you upgrade a user's license:

- Review [which user licenses can be upgraded](#).
- Explore what permissions are affected before you upgrade a user's license. The user's new license, profile, role, and permission set assignments should ideally provide at least the same or comparable level of data access as previous assignments.
- The Customer Community Plus and Partner Community licenses require the user to have a role, which imposes a few restrictions.
  - **An upgrade to a license that requires a role is irreversible.**
  - If the account does have roles and you don't specify one, we associate the user with the lowest role in the hierarchy: Partner <Account Name> User or Customer <Account Name> User.
  - If the user belongs to an account that doesn't have roles, we create one for you.
- Before upgrading a user to the Partner Community license, enable the user's account as a partner account. A partner account can be associated with both customer and partner users, so customer users on the same account aren't affected.
- A license upgrade automatically removes sharing sets, permission sets, and permission set license assignments previously associated with the user.
- License upgrades are subject to most limits that apply to new users, such as the maximum number of licenses and roles in your org, username uniqueness requirements, and so on.

You can upgrade most customer user licenses to either the Customer Community Plus or the Partner Community license.

1. From Setup, enter Users in the Quick Find box, then select **Users**.
2. Click **Edit** next to the user you want to upgrade.
3. Select the new license, profile, and role for the user.
4. Optionally, specify a new profile and role.



**Note:** If the account the user belongs to has no roles, we create one behind the scenes and assign the lowest role that exists in the hierarchy. If the account does have roles, you must choose one. and assign the lowest role that exists in the hierarchy.

5. Save your changes.

After you upgrade a user's license, bear in mind that:

- Changes in profiles and permission sets might affect community membership. Ensure that upgraded users have access to the intended communities.
- We recalculate sharing rules that apply to the upgraded user, for example through their public groups, criteria-based sharing, and record ownership (implicit sharing).

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

### USER PERMISSIONS

To create or edit customer users:

- Manage External Users
- OR
- Edit Self-Service Users

To create, edit, and delete profiles:

- "Manage Profiles and Permission Sets"

To log in as an external user:

- Manage Users
- AND
- Edit on Accounts

- Users upgraded to the Customer Community Plus are automatically associated with the All Customer Portal Users public group. Similarly, users upgraded to the Partner Community licenses are associated with the All Partner Users public group.

SEE ALSO:

[Communities Licenses Eligible for Upgrades](#)

## Communities Licenses Eligible for Upgrades

In general, we support upgrades from most customer licenses to the Customer Community Plus or Partner Community licenses. Specifically, we support license upgrades for all users where their `userType` equals `CSPLitePortal` (in the Salesforce API) to `PowerPartner` or `PowerCustomerSuccess`.

You can upgrade the following licenses to the Customer Community Plus or Partner Community License.




- Customer Community
- External Identity
- High Volume Customer Portal
- Overage High Volume Customer Portal
- Authenticated Website User Overage
- Authenticated Website User

There are other customer licenses associated with the `CSPLitePortal` user type that support license upgrades, but with some loss of data access. For example, the user may lose access to some objects they previously had access to, or the new license might not include one or more user permissions available with the previous license.



**Warning:** We strongly recommend that you explore what permissions are affected before you upgrade a user's license. The user's new license, profile, role, and permission set assignments should provide at least the same or comparable level of data access as previous assignments.













### License Conversion and Upgrade Compatibility




Original license	Convert to...		
	Customer Community (Named User or Login Based)	Customer Community Plus (Named User or Login Based)	Partner Community (Named User or Login Based)
Partner			
Gold Partner	Switching from a partner portal license to a Customer	Switching from a partner portal license to a Customer	An administrator can change the license type and profile on the user record.
Silver Partner	Community license would result in a loss in functionality.	Community Plus license would result in a loss of functionality.	
Bronze Partner	An administrator must disable the contact as a Partner User and re-enable as a Customer User.	An administrator must disable the contact as a Partner User and re-enable as a Customer User.	

#### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Original license	Convert to...		
	Customer Community (Named User or Login Based)	Customer Community Plus (Named User or Login Based)	Partner Community (Named User or Login Based)
Customer Portal Manager Custom			
Customer Portal Manager Standard	Switching from a customer portal license to a Customer Community license would result in a loss in functionality.	An administrator can convert a Customer Portal Manager Custom, Customer Portal Manager Standard, Overage Customer Portal Manager Custom, or Overage Customer Portal Manager Standard license (for a named user) to a Customer Community Plus license and vice versa, by changing the license type and profile on user record.	An administrator must disable the contact as a Customer User, ensure the account is enabled as a Partner Account, and then enable the contact as a Partner User.
Overage Customer Portal Manager Custom	An administrator must disable the contact as a Customer User, and then re-enable as a Customer User to create a new user record and associate it with the new license.		
Overage Customer Portal Manager Standard			
External Identity			
High Volume Customer Portal	An administrator can change the license type and profile on the user record.	An administrator can change the license type and profile on the user record.	An administrator can change the license type and profile on the user record.
Overage High Volume Customer Portal			
Authenticated Website User Overage			
Authenticated Website User			
Customer Community			
	An administrator can convert a Customer Community license (for a named user) to a Customer Community Login license and vice versa, by changing the license type and profile on user record.	An administrator can change the license type and profile on the user record.	An administrator can change the license type and profile on the user record.
Customer Community Plus			
	Switching from a Customer Community Plus license to a Customer Community license would result in a loss in functionality.  An administrator must disable the contact as a Customer User, and then re-enable as a Customer User to create a new	An administrator can convert a Customer Community Plus license (for a named user) to a Customer Community Plus Login license and vice versa, by changing the license type and profile on user record.	An administrator must disable the contact as a Customer User, ensure the account is enabled as a Partner Account, and then enable the contact as a Partner User.

Original license	Convert to...		
	Customer Community (Named User or Login Based)	Customer Community Plus (Named User or Login Based)	Partner Community (Named User or Login Based)
	user record and associate it with the new license.		
Partner Community	 <p>Switching from a Partner Community license to a Customer Community license would result in a loss of functionality.</p> <p>An administrator must disable the contact as a Partner User and re-enable as a Customer User.</p>	 <p>Switching from a Partner Community license to a Customer Community Plus license would result in a loss of functionality.</p> <p>An administrator must disable the contact as a Partner User and re-enable as a Customer User.</p>	 <p>An administrator can convert a Partner Community license (for a named user) to a Partner Community Login license and vice versa, by changing the license type and profile on the user record.</p>

To upgrade users with other license types, you must deactivate them, create new user identities for them, migrate their data over, and associate it with their new user records. For detailed instructions, see User License Conversions in the [Migrating from Portals to Communities](#) guide.

## Create Communities

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

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

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

The Community Creation wizard appears, with different out-of-the-box template options for you to choose from. If you have Lightning Bolt solutions available in your org, you see them in the wizard as well.

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

### Customer 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.

### Partner Central

A flexible, responsive template designed for channel sales workflows. Recruit, build, and grow your partner network to drive channel sales and marketing together in a branded online space. Easily configure lead distribution, deal registration, and marketing campaigns. Share training materials and sales collateral in a central space, and use reports to track your pipeline.

### 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

**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 Salesforce1. Keep in mind that the Salesforce Tabs + Visualforce template doesn't work with Community Builder.

**Kokua**


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

**Koa**

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

**Aloha**

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

 **Note:** The Koa and Kokua templates are starting a phased retirement. In Summer '17, you can no longer use these templates to create communities. Salesforce still supports existing communities that were built using Koa and Kokua. To create a community based on Koa or Kokua, contact Salesforce Support. However, we recommend that you work with Salesforce Support on a plan to replace your existing Koa and Kokua communities. New Lightning communities provide richer support for Knowledge and case management.

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

**Data Category Group Name**

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


**Top Level Category**

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

**Company Name**


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

6. Enter a community name.

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

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

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

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

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

**8. Click `Create`.**

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

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



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

## SEE ALSO:

[Set Up and Manage Salesforce Communities](#)

[Customize Communities](#)

[How many communities can my org have?](#)

[Compare Features Available in 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 a Community from a 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.

1. From Setup, enter *All Communities* in the Quick Find box, then select **All Communities**, and then click **New Community**.

The Community Creation wizard appears, with different 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.

### Partner Central

A flexible, responsive template designed for channel sales workflows. Recruit, build, and grow your partner network to drive channel sales and marketing together in a branded online space. Easily configure lead distribution, deal registration, and marketing campaigns. Share training materials and sales collateral in a central space, and use reports to track your pipeline.

### 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 Salesforce1. 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.

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### Aloha

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



**Note:** The Koa and Kokua templates are starting a phased retirement. In Summer '17, you can no longer use these templates to create communities. Salesforce still supports existing communities that were built using Koa and Kokua. To create a community based on Koa or Kokua, contact Salesforce Support. However, we recommend that you work with Salesforce Support on a plan to replace your existing Koa and Kokua communities. New Lightning communities provide richer support for Knowledge and case management.

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

### 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

**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 with this profile can log in to the community once it's *Active*. If you don't want all users with your profile to have access to the community, remove the profile and give yourself access through a different profile or permission set.

**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.

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

1. Open [Community Workspaces](#) or [Community Management](#).
2. Click **Administration > Members**.
3. To add members using profiles:
  - a. To filter profiles, select a profile type from the drop-down menu. To search for a specific profile, enter a search term and click **Find**.  
Search returns profiles for the selected filter.

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

- b. Select the user profiles you want to allow access to your community. Press CTRL to select multiple profiles.
- c. Click **Add**. To remove a profile, select it and click **Remove**.  
If you remove a profile from a community, users with that profile lose access to the community, unless the users are assigned permission sets or other profiles that are still part of the community. Their posts and comments still appear.

 **Important:** If you're an administrator and accidentally remove yourself from a community, you 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.

 **Note:** User sharing doesn't apply to the Recently Viewed list on the People tab in Chatter or on user lookups. From that list, users can view people they have viewed before, but who aren't members of the community.

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 *Users* in the **Quick Find** box, select **Users**, select the checkbox next to the user's name, and then click **Reset Password**. An email containing the user's username and a link to reset their password will be sent to the user. The link in this email doesn't expire.

### EDITIONS

Available in: Salesforce Classic 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 `permissionsetId` you want to add.
4. Open Data Loader and select the **Network Member Group** object. Specify the location of the .csv file you created and complete the Data Loader steps.

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



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

## Add Tabs to Your Community

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



**Tip:** If you want to use all custom pages in your community, you can choose to hide tabs.

Before you begin, keep these things in mind:

- Enable the tabs that are required for the type of activity you're performing in this community. For example, 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. If a profile doesn't have access to a tab, the tab is hidden for that profile in 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. To select multiple tabs, press CTRL.
4. To add a tab, click **Add**. To remove a tab, select it in the Selected Tabs list and click **Remove**.
5. To change the order that the tabs display, click **Up** or **Down**.

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

If members don't have access to the community landing tab, they see the first tab that 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.

### 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

6. Click **Save**.

 **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](#)

## 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.

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

Color Choice	Where it Appears
Header Background	Top of the page, under the black global header. If an HTML file is selected in the Header field, it overrides this color choice.  Top of the login page.  Login page in Salesforce1.
Page Background	Background color for all pages in your community, including the login page.
Primary	Tab that is selected.
Secondary	Top borders of lists and tables.  Button on the login page.
Tertiary	Background color for section headers on edit and detail pages.

5. Click **Save**.

SEE ALSO:  
[Customize Communities](#)

### 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

## 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.

 **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

Is a member of the community

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

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



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

7. Click **Save**.

Emails that are sent as a result of approvals and workflows, and changes to unscoped objects, like cases, 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.



**Note:** Objects that you can see whether you're in a community or your internal Salesforce org are called unscoped objects. Unscoped objects include records like opportunities, accounts, cases, and the like.

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
<code>{!Community_Name}</code>	The name of the community, as entered during community creation.
<code>{!Community_Url}</code>	<p>The URL to the login page of a community. For instance, <a href="https://acme.force.com/partners/login">https://acme.force.com/partners/login</a>.</p> <p>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.</p> <p>This field is populated only if:</p> <ul style="list-style-type: none"> <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> <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>
<code>{!Receiving_User.Username}</code>	The user name of the user who will receive the welcome email.

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

Field Name	Description
<code>\$Network.Name</code>	The name of the community, as entered during community creation.
<code>\$Network.NetworkUrlForUserEmails</code>	<p>The URL to the login page of a community. For instance, <a href="https://acme.force.com/partners/login">https://acme.force.com/partners/login</a>.</p> <p>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.</p>

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
<code>{!Case.Link}</code>	Used in: <ul style="list-style-type: none"> <li>Case comment notifications to contacts and owners</li> <li>Case creation and update notifications to contacts</li> </ul>
<code>{!&lt;any_object&gt;.Link}</code>	Used in: <ul style="list-style-type: none"> <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 Notifications in Lightning Communities

With Global Notifications, your members receive messages wherever they are working, whether in their communities or in their apps. Members receive notifications on any screen—mobile, tablet, and desktop. This functionality is available in communities based on Customer Service (Napili), Partner Central, and any Lightning Bolt solutions.

Available in: Lightning Experience

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

### USER PERMISSIONS

To create permission sets:

- Manage Profiles and Permission Sets


To assign a permission set to a user:

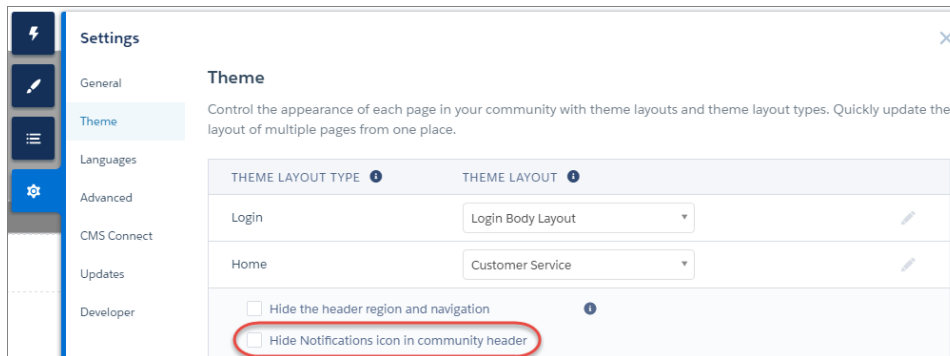
- Assign Permission Sets



All events that trigger notifications (@mentions and group posts) are supported. Members can even trigger notifications on record feeds. For example, an internal member can trigger a notification from the Salesforce org by @mentioning an external member on a lead or opportunity. When a member clicks a notification, the originating detail page or other appropriate location is displayed for seamless collaboration across communities and apps.

By default, the Notifications icon is hidden in existing communities and displayed in new communities.

1. In Community Builder, click  on the left sidebar and then click **Theme**.
2. For the default Customer Service theme layout, show or hide Notifications for your members by selecting **Hide Notifications icon in community header** in community header.



## Enable the App Launcher in Lightning Communities

Display the App Launcher in Lightning communities to make it easy for members to move between their communities and their Salesforce org. This functionality is available in communities based on Customer Service (Napili), Partner Central, and any Lightning Bolt solutions.

Available in: Lightning Experience

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



The App Launcher displays a tile for every app and published community (both Tabs + Visualforce and Lightning communities). Unlike in Lightning Experience, the All Items area and AppExchange link aren't available. Users see only the apps and communities that they're authorized to see according to their profile or permission sets.

By default, the App Launcher is hidden in existing communities and displayed in new communities.

1. Select the **Navigation Menu** component in the page you're configuring.
2. To display the App Launcher in existing communities, deselect **Hide App Launcher in community header**.

### USER PERMISSIONS

To create permission sets:

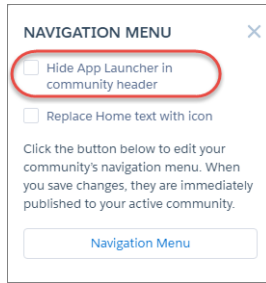
- Manage Profiles and Permission Sets

To assign a permission set to a user:

- Assign Permission Sets

To let members see the App Launcher

- Show App Launcher in Communities



- To let users see the App Launcher, enable the Show App Launcher in Communities permission in user profiles in Setup. By default, this user permission is enabled for all standard profiles and not enabled for custom profiles. Enable this user perm on custom profiles or create a permission set.

**Note:** The App Launcher is not available in any Salesforce mobile experience or in Salesforce Tabs + Visualforce communities. Members who use Salesforce Tabs + Visualforce communities and Salesforce Classic can use the global header to switch between their communities and their Salesforce org.

SEE ALSO:

[Switch Between Your Salesforce Org and Your Communities](#)

[Enable the Global Header for Communities](#)

## Enable the Global Header for Communities

In Salesforce Tabs + Visualforce communities and Salesforce Classic, the global header lets you switch between your communities and your Salesforce org.

Available in: Salesforce Classic

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

### USER PERMISSIONS

To create permission sets:

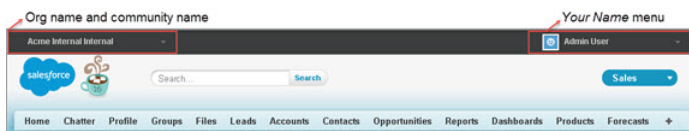
- Manage Profiles and Permission Sets

To assign a permission set to a user:

- Assign Permission Sets

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

**Important:** The global header is visible only in Salesforce orgs using Salesforce Classic. Salesforce orgs using Lightning Experience can use the App Launcher.



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

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

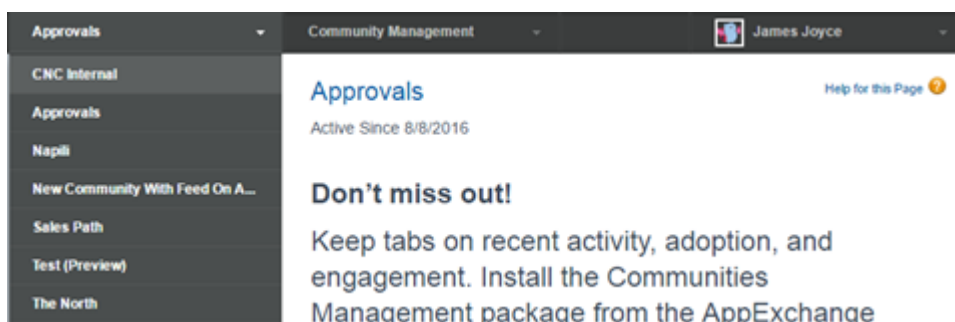
Users with this permission set see the global header at the top of all pages. They can use the menu on the left to switch between their internal org and any communities they have access to.

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

In a Salesforce Tabs + Visualforce community, users with either the Manage Communities or the Create and Set Up Communities permission see a gear icon (⚙️) they can use to switch to Community Workspaces or Community Management.



**Note:** Within Community Workspaces or Community Management, users see the global header and the Community Management menu, even if they don't have the View Global Header permission. However, we recommend that you still assign the View Global Header permission so users can switch between your Salesforce org and communities.



SEE ALSO:

[Switch Between Your Salesforce Org and Your Communities](#)

[Enable the App Launcher in Lightning Communities](#)

## Share a Link to Your Community

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

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

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

1. 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](#)

### 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

## Activate Your Community

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


- **Salesforce Tabs + Visualforce:** Activating the community makes the community URL active and enables login access for community members. If [welcome emails are enabled](#) when you activate, a welcome email is sent to all members. If any of those users are new portal users, their welcome email includes their username and password.
  - **Koa, Kokua, or Customer Service (Napili):** Activating the community sends out a welcome email to all community members and registers the site with Brombone™, a search engine optimization service. To make the community URL active and enable login access for community members, [publish the community](#).
1. Open [Community Workspaces](#) or [Community Management](#).
  2. Click **Administration > Settings**.
  3. Click **Activate Community**.

SEE ALSO:

- [Communities Statuses](#)
- [Customize Communities](#)
- [Deactivate a Community](#)

## Communities Statuses

Communities can have one of the following statuses.

Status	Description
Preview	<p>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 <code>Preview</code> status.</p> <p>Users with "Create and Set Up Communities" can access communities in <code>Preview</code> 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 <code>Preview</code> community is located on the Community Management page. If you're using Community Workspaces, the link for sharing a <code>Preview</code> community is located under Administration.</p> <p>No welcome emails are sent even if <code>Send welcome email</code> is selected.</p> <p> <b>Note:</b> If your organization's access to Communities is suspended for non-payment of fees due, all your communities are deactivated, including those in <code>Preview</code> status. When Communities is enabled again, all communities are in <code>Inactive</code> status. You can activate these communities, but can't return to the <code>Preview</code> status.</p>

### 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

Status	Description
Inactive	<p>The community was previously <b>Active</b> but was deactivated.</p> <p>You may want to deactivate a community if you need to:</p> <ul style="list-style-type: none"> <li>• Add or remove members</li> <li>• Add, remove, or change the order of tabs</li> <li>• Change the color scheme</li> <li>• Change the community URL</li> </ul> <p>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 <b>Inactive</b> communities regardless of membership. If members try to access <b>Inactive</b> communities using a direct link, they see an error page.</p>
Active	<p>The community is active and available to members.</p> <p>Welcome emails are sent to new members if <b>Send welcome email</b> is selected.</p>


## SEE ALSO:

[Customize Communities](#)[Activate Your Community](#)[Deactivate a Community](#)[Share a Link to Your Community](#)

## Update Your Community Settings

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

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

## 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

## 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](#)

## 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.

 **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.

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

### 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

Is a member of the community

(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.


 **Note:** The Koa and Kokua templates are starting a phased retirement. In Summer '17, you can no longer use these templates to create communities. Salesforce still supports existing communities that were built using Koa and Kokua. To create a community based on Koa or Kokua, contact Salesforce Support. However, we recommend that you work with Salesforce Support on a plan to replace your existing Koa and Kokua communities. New Lightning communities provide richer support for Knowledge and case management.

To learn more about using communities templates, see the [Using Templates to Build Communities](#).


To learn more about using the Aloha template, see the [Getting Started with the Aloha Community Template for Salesforce Identity](#).

## Considerations for Changing Your Community Template

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

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

- When you change your template, Salesforce object data carries over, but some branding and component customizations do not. Prepare to redo customizations as necessary.
- Changing the community template updates the navigation options in Community Workspaces or Community Management. To view all available navigation options regardless of template selection, select **Administration Preferences > Show all settings in Community Workspaces or Community Management**.
- Your community URL changes when switching from a Salesforce Tabs + Visualforce template to any other template type. Specifically, `/s` is appended to the community URL. Be sure to update any links to your community with the updated URL.
- In active communities
  - When you switch over to the Koa, Kokua, or Customer Service (Napili) templates, your template change is saved in a draft version. Use the draft version to further customize your community in Community Builder. Your community is updated only after you publish your changes.
  - When you switch to the Salesforce Tabs + Visualforce template from any other template, your changes immediately reflect in your active community. In this scenario, we recommend that you deactivate your community before you change your template. Once you've made all your changes, reactivate the community.
  - If your template is listed as `None`, it means you're not using a predefined template or you are using a modified version of one of our templates.

 **Note:** The Koa and Kokua templates are starting a phased retirement. In Summer '17, you can no longer use these templates to create communities. Salesforce still supports existing communities that were built using Koa and Kokua. To create a community based on Koa or Kokua, contact Salesforce Support. However, we recommend that you work with Salesforce Support on a plan to replace your existing Koa and Kokua communities. New Lightning communities provide richer support for Knowledge and case management.

To learn more about using communities templates, see the [Using Templates to Build Communities](#).

To learn more about using the Aloha template, see the [Getting Started with the Aloha Community Template for Salesforce Identity](#).

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

## 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.
- [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 334 within your community. Members may want to flag items that contain inappropriate language or sensitive information.
- [Enable Reputation](#) on page 369 to allow community managers to set up a point system that rewards users who participate in the community. Administrators set up corresponding reputation levels that users see on their profile.
- [Enable knowledgeable people](#) on page 369 so you can discover who's knowledgeable on topics and endorse people for their knowledge on a topic.

### Files

- Set the maximum size in MB for files uploaded to the community.
- Specify the types of files that can be uploaded in the community.

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.

### 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 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, Salesforce1 and any community sites activated using community templates show nicknames as well.

A few restrictions to keep in mind about nickname display:

- Private messages display full names. You can choose to turn off private messages to avoid this.
- Records and user lookups on records show full names. Keep in mind, though, that you can control record and user visibility with sharing rules.

## 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
- Is a member of the community

- 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](#)

## 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

### 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
- Is a member of the community

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
- 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**.

## 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.

### 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 limit the files in your community:

- Manage Communities OR Create and Set Up Communities

AND

Is a member of the community

- **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](#)

## 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 in the following editions: Enterprise, Performance, and Unlimited. Custom domains aren't supported in Developer Edition orgs. You can configure a custom domain in a sandbox and then migrate it to production, but the custom domain is active only in production.

When you add a domain, you also have the option of setting up HTTPS, which is recommended. HTTPS is required for using a domain with authenticated communities.

1. From Setup, enter *Domains* in the Quick Find box, then select **Domains**.
2. Click **Add a Domain**.
3. Enter the domain name.
4. Choose the HTTPS option you want to serve this domain with.
5. Add a certificate if you have already set up a CA-signed certificate that supports this domain.
6. Click **Save**. To add another domain, click **Save & New**.

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 pointing your domain name's CNAME to a new target name, ensure that the target name exists in the DNS by using `dig` or `nslookup`. When you created your domain name affects the target of your CNAME.

- To use HTTPS for domain names added before the Summer '13 release, adjust your CNAME to point to the FQDN followed by `.live.siteforce.com` instead of to the org's `force.com` subdomain. For example, if your pre-Summer '13 domain is `www.example.com`, its CNAME target is `www.example.com.live.siteforce.com` instead of `example.force.com`.
- Domain names added in Summer '13 or earlier don't have the 18-character org ID in the CNAME target.
- Domain names added in Summer '13 or later point to the location for setting up HTTPS in a custom domain.
- Domain names added in Winter '14 or later use a CNAME that points to the FQDN followed by your org's 18-character ID and `.live.siteforce.com`. For example, if your domain name is `www.example.com` and your 18-character org ID is `00dxx0000001ggxeay`, its CNAME target is `www.example.com.00dxx0000001ggxeay.live.siteforce.com`.

### USER PERMISSIONS

To view a domain:

- View Setup and Configuration

To add a domain:

- Customize Application OR View Setup and Configuration plus either a Site.com Publisher license or Create and Set Up Communities

To edit or delete a domain:

- Customize Application

## 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.

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

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

```
<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$public/
CommunityChangePasswordEmailTemplate</changePasswordEmailTemplate>
  <emailSenderAddress>admin@yourorg.com</emailSenderAddress>
  <emailSenderName>Admin User</emailSenderName>
  <forgotPasswordEmailTemplate>unfiled$public/
CommunityForgotPasswordEmailTemplate</forgotPasswordEmailTemplate>
  <invitationsEnabled>false</invitationsEnabled>
  <networkProfiles>
    <profile>
      <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>

```


```
</types>
<version>28.0</version>
</Package>
```

## Set Up 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. Search Engine Optimization (SEO) can significantly improve discovery for public communities.

Available in: Salesforce Classic and Lightning Experience

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

 **Note:** For communities that use the Customer Service (Napili), Koa, or Kokua templates, activating a community automatically registers it with BromBone™, an SEO service.

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

### sitemap.xml

The `sitemap.xml` file contains a list of your community URLs. Search engines use this list to find out which pages of your community are available for crawling and indexing.

The 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 includes an entry for each supported language as follows:

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

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

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

### robots.txt

The `robots.txt` file 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.

The file 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 limit indexing to specific areas 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 Properties](#) 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, the title and description values of the Article Detail page 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. You can choose which areas of your community to index by creating a Visualforce page to host the information. 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. You can choose which areas of your community to index by creating a Visualforce page to host the information. Search engines use the file to index your community pages.

Available in: Salesforce Classic and Lightning Experience

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`. The `robots.txt` file is 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 `robots.txt` file, so be sure that your indexing rules account for the pages in all your communities. The Visualforce page with the `robots.txt` information must be placed at the root-level community.
1. Create a list of include and exclude rules for the areas of your community that you want to expose to or hide from search engines. Save this information in a text file.
  2. To create a Visualforce page, in Setup, enter *Visualforce Pages* in the Quick Find box. Then select **Visualforce Pages** and click **New**. Give it any name; you can even call it `robots`.
  3. Add your list of indexing rules to the Visualforce page.
  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  to search for the file.
  7. Click **Save**.
  8. Optionally, submit your `sitemap.xml` file 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 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 and Lightning Experience

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

- Don't create a custom site map. Use the auto-generated `sitemap.xml` file instead.
- 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 not replacing the URLs of translated articles with language-specific URLs. Instead, keep the same URL as the base language article.

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

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

- In Page Properties, 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 exclude Case Detail URLs from the site map, from Setup, enter *Sharing Settings* in the Quick Find box. Then, click **Edit** and for the Default Internal Access for Case setting, select **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 page. To verify that the option is selected, in Community Workspaces or 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 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 and Lightning Experience

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. The file can contain a limited number of URLs. 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 exclude Case Detail URLs from the site map, from Setup, enter *Sharing Settings* in the Quick Find box. Then, click **Edit** and for the Default Internal Access for Case setting, select **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 appear. If you don't have a custom URL set up and you're 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 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.

For consistency and robustness, the record ID is also included in article URLs using the format `/article/:recordId/:urlName`. This format makes it easier to create custom components that rely on a generic record ID and use them on the article detail page.

For example, `https://mycommunity.com/s/article/some_article` redirects to `https://mycommunity.com/s/article/0D5B0000007qtP7KAI/some_article`.

**Tip:**

- If your org has custom components that rely on the article's `urlName`, update the components to use `recordId` instead.
- If your org supports multilingual Knowledge articles, we recommend not replacing the URLs of translated articles with language-specific URLs. Instead, keep 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 the `title` 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.

**How are non-canonical URLs for object pages handled?**

To improve your community's SEO ranking, we redirect non-canonical URLs to canonical URLs using 301 redirects. A canonical URL lets you tell search engines that slightly different URLs, which all point to the same content, are actually the same thing. A 301 redirect indicates that a URL has been permanently moved, which is optimal for SEO.

For example, let's say you add object pages for the Account object. In this case, the detail page has an object-specific Account Detail page and a generic Record Detail page. When community members access the generic Record Detail page (`/s/detail/:recordId`), they're permanently redirected to the canonical URL of the object-specific Account Detail page instead (`/s/account/:recordId`). Similarly, 301 redirects are used for list and related list pages.



**Note:** URL redirects occur only when a URL is accessed directly from the browser URL bar or from a link that's external to your community.

**How are SEO-friendly URLs created for object detail pages?**

To create a user-readable URL for the detail page of a standard or custom object, we append the value of the object's `Name` field to the URL. For example, for AW Computing's Account Detail page, we redirect

`https://mycommunity.com/s/account/001R0000002NzuaIAC` to

`https://mycommunity.com/s/account/001R0000002NzuaIAC/aw-computing`.

Where the `Name` field isn't available, we use the `Subject` or `Title` fields. Otherwise, we append "detail" to the URL.

 **Note:** The Case, Dashboard, Group, Report, and User Profile objects aren't supported.

SEE ALSO:

[Set Up 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.

[Customize Code for Lightning Components on Login Pages](#)

To add custom logic to the Login pages in Lightning communities, customize the Lightning component for those 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

Is a member of the community

## 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 Salesforce1. 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


Is a member of the community


## 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®, Janrain®, or Salesforce credentials from another organization, select those from the list.

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

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 99 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

Is a member of the community

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 Code for Lightning Components on Login Pages](#)

[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:

```
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**.

### USER PERMISSIONS

To create and edit Visualforce pages:

- Customize Application

To edit Apex classes:

- Author Apex

AND

Customize Application

10. From Setup, enter *Visualforce Pages* in the Quick Find box, then select **Visualforce Pages**.
11. Click **Edit** next to `CommunitiesLogin`.
12. In the first line of code, add the following:

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

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

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

16. Click **Save**.

## Redirect Community Members to a Custom URL on Logout

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

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

1. 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


Is a member of the community

## Use Custom Change Password and Forgot Password Pages in Your Community

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

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

The Change Password page can only be customized in Visualforce.

1. Open [Community Workspaces](#) or [Community Management](#).
2. Click **Administration** **Login & Registration**.
3. In the password section, select the Page Type: **Community Builder** or **Visualforce**.
4. Enter the name of the page or leave the field blank to search for all available pages.
5. Click , then click the name of the page in the search results to select it.
6. Click **Save**.

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

SEE ALSO:

[Customize Code for Lightning Components on Login Pages](#)

[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

Is a member of the 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

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 Code for Lightning Components on Login Pages](#)


[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.

 **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.

### EDITIONS


Available in: Salesforce Classic and Lightning Experience

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

## 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.

 **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.

### 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

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.



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

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

## Customize Code for Lightning Components on Login Pages

To add custom logic to the Login pages in Lightning communities, customize the Lightning component for those pages.

Each community comes with a default set of Login pages: Check Password, Forgot Password, Login, Login Error, Register. Each has a standard Lightning component that drives this functionality. You can add code logic to customize the login experience per your company and community's requirements.

1. From Setup, enter *Lightning Components* in the Quick Find box, then select **Lightning Components** under Develop.
2. From the list of components, click on the one you want to customize.  
For example, to customize the login experience, click loginForm.
3. On the Lightning component detail page, click **Developer Console**.
4. Follow the instructions in the code to expose the component in Community Builder.
5. Add custom code logic and save your changes as a new custom component.
6. Go back to Community Builder in your community and bring up the Login page from the list of pages. The custom component you created should display in the list of components.

### EDITIONS

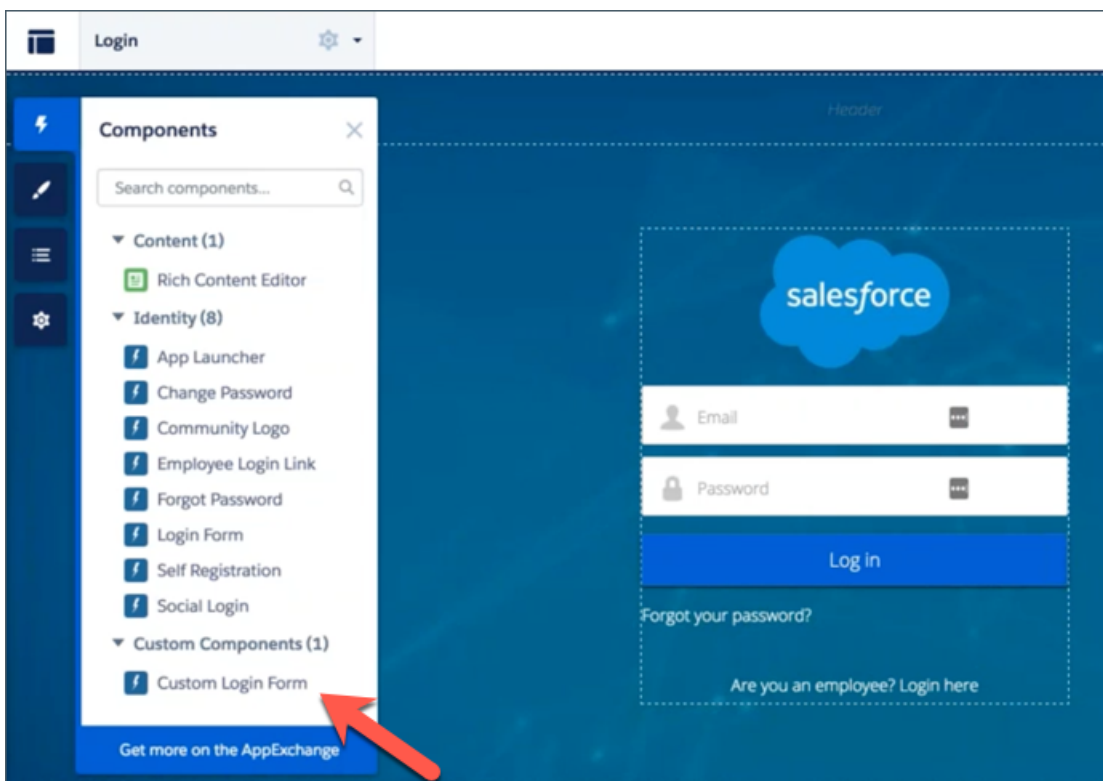
Available in: Salesforce Classic and Lightning Experience

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

### USER PERMISSIONS

To create and edit Lightning components:

- Customize Application



## 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 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".

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](#)

### 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](#)

## 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

x

**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

Medium • Escalated • 00001226

Write a new post... **1** Post

**Madison Rigsby** August 7, 2015 at 4:15 PM **2**

For reference, here's what we're sending you. Happy camping!

Like Write a comment...

**Madison Rigsby** August 7, 2015 at 4:07 PM ▼

Hi Pete - good news! The shipping vendor has located your shipment and it's on track to be delivered this Friday by noon.

Like Write a comment...

**Madison Rigsby** sent an email. August 7, 2015 at 2:25 PM ▼

**Shipment Not Delivered**  
Hello,  
I'm checking in on shipment #49623 on behalf of my customer, Pete. It seems the shipment was delivered to the wrong address. How can we ensure that Pete gets his shipment?  
Thanks!  
Madison

**CASE DETAILS**

**Case Owner** Question  
[Madison Rigsby](#)

**Case Number** Question from Chat  
00001226 00001226

**Contact Name** Zone  
[Online Visit](#)

[View All](#)

**ATTACHMENTS (1)** **3**

T199

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.

 **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.

Case Detail	Chatter Case Detail ▼	The page that displays a customer case.
-------------	-----------------------	-----------------------------------------

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...".

### EDITIONS

Available in: Salesforce Classic

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

SEE ALSO:

[Emails in the Community Case Feed](#)

[Expose or Hide a Published Post or Email in the Community Case Feed](#)

[Set Up the Community Case Feed](#)

## Emails in the Community Case Feed

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

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

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

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



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

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

```

}

}

```

## SEE ALSO:

[Expose or Hide a Published Post or Email in the Community Case Feed](#)

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

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

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

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

### Make Public option on a case Chatter post:

#### EDITIONS

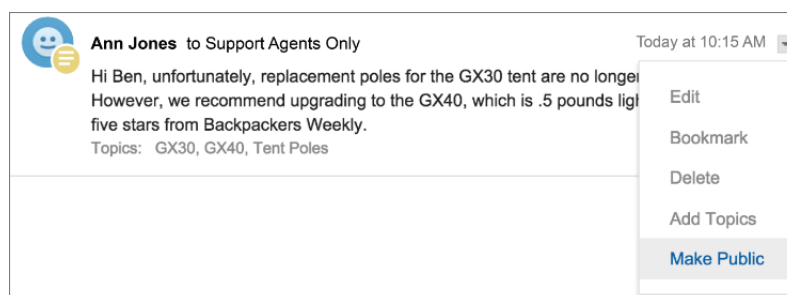
Available in: Salesforce Classic

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

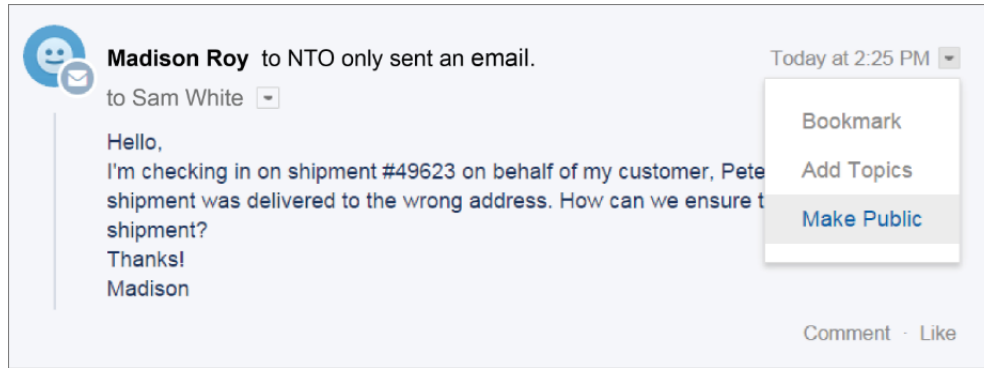
#### USER PERMISSIONS

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

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




### Make Public option on a case email:



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

### Making Emails and Chatter Posts *Private*

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

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

### Making Emails and Chatter Posts *Public*

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

 **Note:**

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

SEE ALSO:

[Community Case Feed](#)

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

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

To post on cases in a customer portal or community:

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

### EDITIONS

Available in: Salesforce Classic

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

### USER PERMISSIONS

To create case posts in customer portals or communities:

- Edit on cases

Post Email Log a Call Community Change Status More

Hi Pete,  
We're sending you a new climbing harness system to replace the defective one. Please let us know if you have any questions or feedback on the new system!

Your message will be posted to the customer case.

Post

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.


Post Email Log a Call Community Change Status More

Pete, thanks for your question! The TX20 climbing harness system supports up to 300 pounds.


☐ Customer Case ☒ Community Question

Answer

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

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

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


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

SEE ALSO:  
[Community Case Feed](#)

## Enable Chatter Questions in Your Community

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


Post To **Camping** ▾

Is my rain fly the right shape for my tent?

I bought the fly second-hand and haven't gone camping with it yet, but I'm concerned it's too small. I've attached a photo of the fly on the tent. Any advice is appreciated!

 rain fly.jpg  
541KB • JPG

CAMPINGRAIN FLYTENTADDTOPIC

 Attach

ASK

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**.

### EDITIONS


Available in: Salesforce Classic

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

### USER PERMISSIONS


To edit the global publisher layout:

- Customize Application


 **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 Lightning communities 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

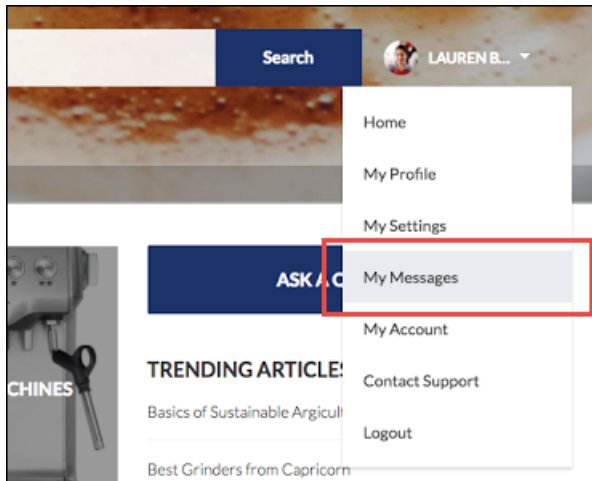
Is a member of the community

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

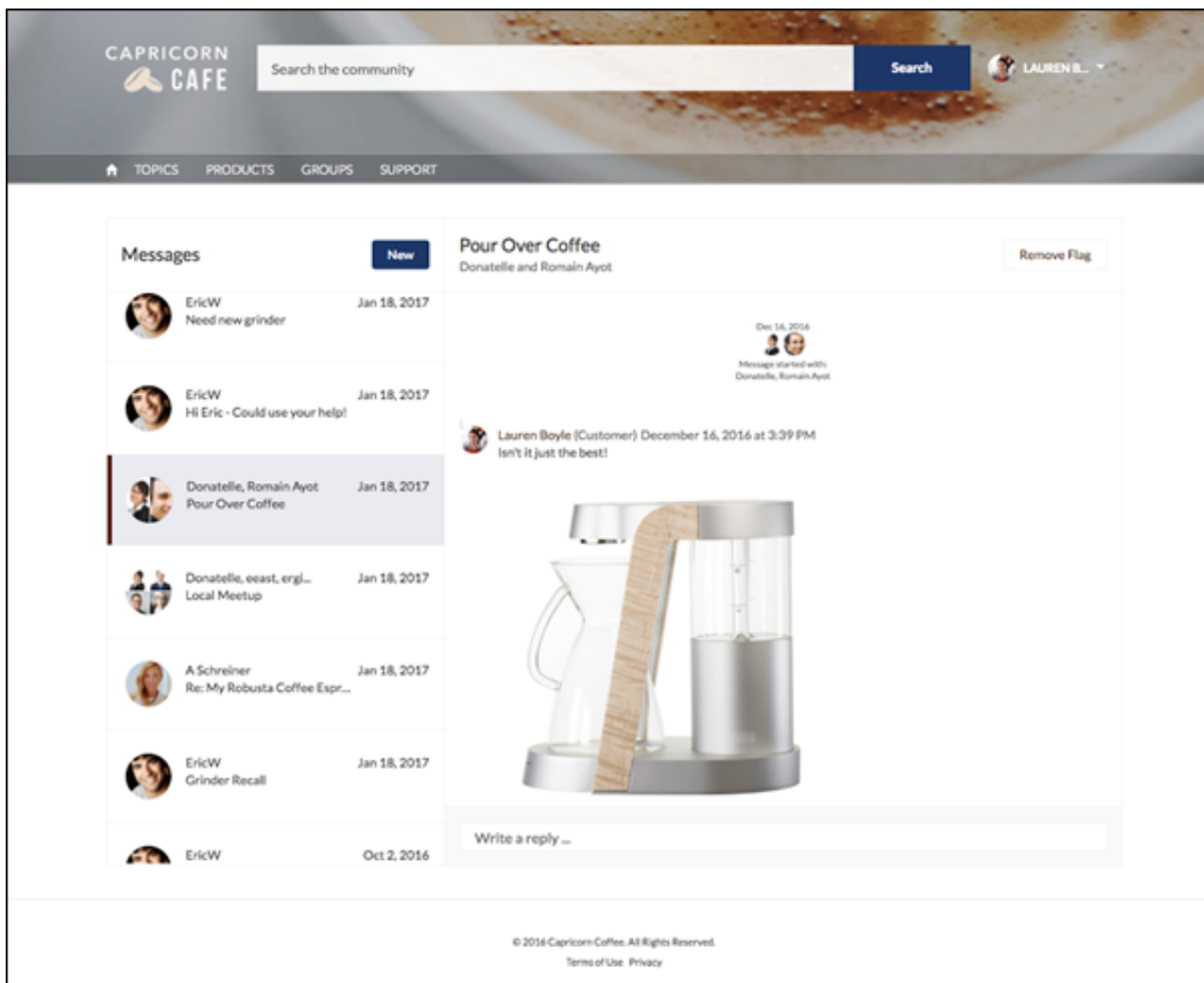
- Moderation applies to all feed posts regardless of where they are visible

To enable Chatter:

- Customize Application



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 be enabled only in Lightning communities 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 “Moderate Chatter Messages and Direct Messages” permission can view all the direct messages data in your org.
- To moderate flagged direct messages, the moderator needs “Moderate Chatter Messages and Direct Messages” permission and the “Moderate Communities Chatter Messages” permission.
- To maintain privacy, community search doesn’t show direct message in search results.
- 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. We recommend that you switch to direct messages.

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

## 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.

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**.

### 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:

- **Customize Application**

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

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

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

## Set Up Question-to-Case

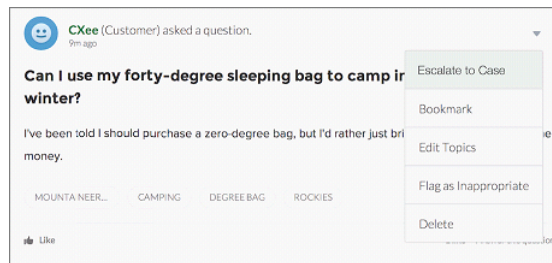
Add Question-to-Case to your communities, your Salesforce organization, or both.

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

### EDITIONS

Available in: **Salesforce Classic**

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



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

### IN THIS SECTION:

1. [Enable Question-to-Case](#)  
Question-to-Case lets moderators create cases from questions in Chatter to ensure that your customers' questions are quickly resolved. Enable Question-to-Case in your communities, Salesforce organization, or both.
2. [Add the Question from Chatter Field to the Case Detail View](#)  
When a case is created from a question in Chatter, the `Question from Chatter` field on case detail pages displays a link to the original question. This field helps agents quickly navigate to the feed.
3. [Add the Escalate to Case Action to the Feed Item Layout](#)  
Give moderators the ability to create cases from questions by adding the Escalate to Case action to Chatter Questions pages. This action is created automatically when Question-to-Case is enabled in your organization.
4. [Confirm Access to the Escalate to Case Action](#)  
Does your 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.

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



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

### EDITIONS

Available in: Salesforce Classic

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

### USER PERMISSIONS

To enable Question-to-Case:

- **Customize Application**

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

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

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

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

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

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

## 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 set field-level security:

- Manage Profiles and Permission Sets

AND

Customize Application

To customize page layouts

- Customize Application

### EDITIONS

Available in: Salesforce Classic

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

### USER PERMISSIONS

To edit page layouts:

- Customize Application

## Confirm Access to the Escalate to Case Action

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

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

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

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

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

## Customize the Escalate to Case Action Layout

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

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



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

### EDITIONS

Available in: Salesforce Classic

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

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:

- Customize Application

## Automatically Assign Cases from Questions to a Queue

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

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

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

To learn how to create a queue, see [Create Queues](#).


### EDITIONS

Available in: Salesforce Classic

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

## Automatically Create Cases from Unresolved Questions in Chatter

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

 **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:

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

### Tip:

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

### 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

## Let Guest Users Create Cases


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

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

 **Tip:** Assign case field-level security and guest user actions appropriately so guest users have access to what they need but can't see your company private information.

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

1. From Setup, enter *Web-to-Case* in the **Quick Find** box, then select **Web-to-Case**.
2. Select **Enable Web-to-Case**.
3. To ensure that guest users can log cases through contact support, from Setup, enter *Communities* in the **Quick Find** box, then select **All Communities**.
4. Select **Builder** next to the community you want your guest users to log cases via contact support.
5. Click the drop-down arrow next to your community name and select **Community Management**.
6. On the left-hand panel, click **Administration**.
7. Click **Pages**.
8. Click **Go to Force.com**.
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.

### 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.
- c.** Create custom fields and set validation rules on them.

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

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

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

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

### USER PERMISSIONS

To customize Ideas settings:

- **Customize Application**

## 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.

**Select Approver**

Using the options below, specify the user to whom the approval request should be assigned.

☐ Let the submitter choose the approver manually.  
☐ Automatically assign an approver using a standard or custom hierarchy field: --None--  
☐ Automatically assign to queue:   
☒ Automatically assign to approver(s).

Customer Portal User   
 User  
 Partner User  
**Customer Portal User** selected:  
 Related User on the FIRST response.  
☐ Require **UNANIMOUS** approval from all selected approvers.

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

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

### 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

## Enable Analytics in Your Community

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

1. Set up Analytics in your Salesforce org, as described in the [Analytics Platform Setup](#) section.
2. Enable Analytics for Communities and set up community members. See [Enable Analytics for Communities](#).
3. In Analytics, create dashboards and save them in an Analytics app. Designate that app for sharing with the community. For more information about working with Analytics, refer to the [Analytics Library](#).
4. Embed your Analytics dashboards using either Community Builder or Visualforce.
5. From the Analytics 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 Analytics 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 and Lightning Experience

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

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 Analytics settings:

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

To view, explore, and share embedded Analytics 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®, Janrain®, or another Salesforce organization if you set up authentication providers on the Auth. Providers page in Setup and choose to display them on the community login page.

[Configure Authentication Flows with OAuth](#)

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

## SEE ALSO:

[Customize Login, 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.

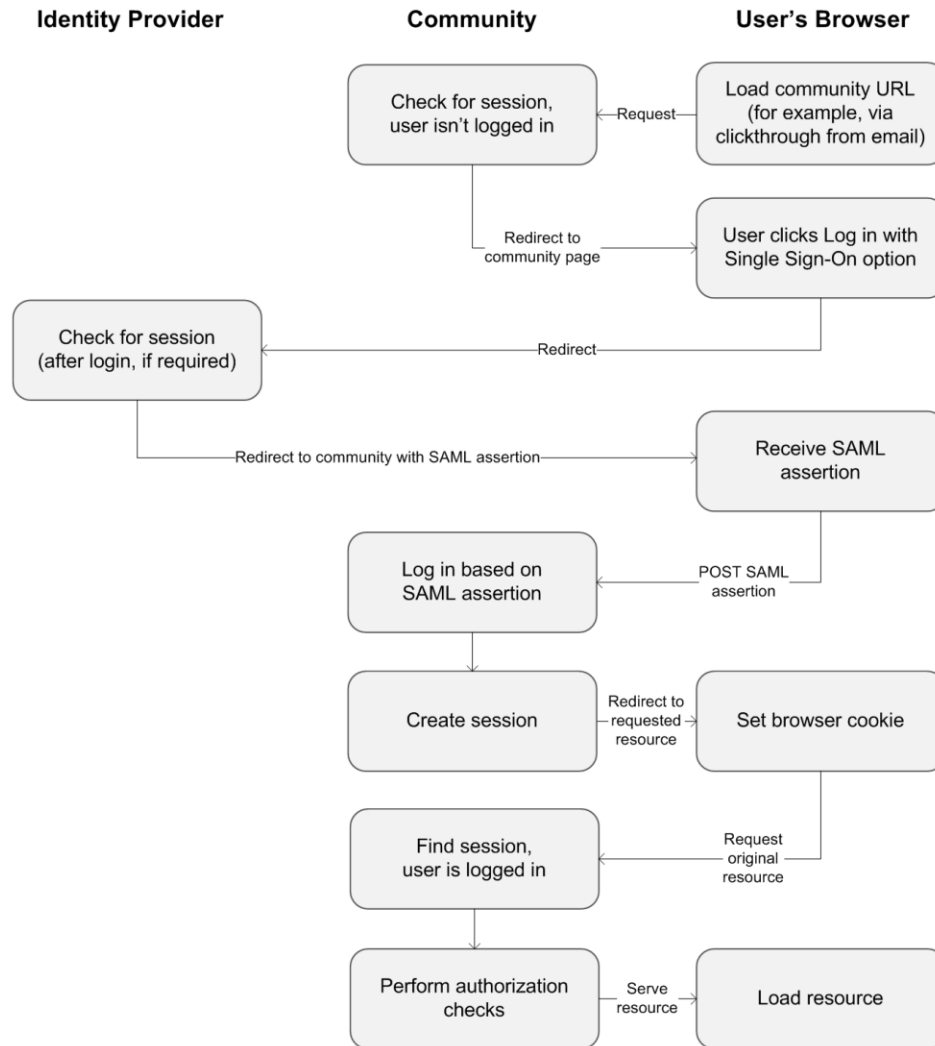
The following information assumes that you are already familiar with Security Assertion Markup Language (SAML) authentication protocols and know how to work with your identity provider to configure single sign-on for your organization. When implementing SAML for communities, the key is to use the community 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	<i>community URL</i>
Are <code>organization_id</code> and <code>portal_id</code> required in assertion?	No	Yes—passed as an attribute	Yes—passed as an attribute	No  <b>Note:</b> Required if using Just-in-Time provisioning to create portal users in the community. Community-specific portal users can be provisioned with <code>portal_id</code> excluded.
Is <code>siteUrl</code> required in assertion?	No	No	Yes—passed as an attribute	No

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

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

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

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

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

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

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

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

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

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

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

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

- The trailing slash after `login` is not required

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

The Recipient would look like this:

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

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

SEE ALSO:

[Single Sign-On with SAML on Force.com](#)

## Configure Authentication Providers

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

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

If you're using a custom Visualforce login page instead of the default login page, use the *Single Sign-On Initialization URL* from an Auth. Provider detail page as the target URL of a custom login button. For example:

```
https://login.salesforce.com/services/auth/sso/orgID/URLsuffix?community=https://acme.force.com/support
```

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

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


SEE ALSO:

[Customize Login, 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 00D50000000IehZ\!AQcAQH0dMHZfz972SzmPkb58urFRkgeBGsxL_QJWwYMfAbUeeG7c1E6LYUfiDUkWe6H34r1AAwOR8B8fLEz6n04NPGRrq0FM"`

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 in the presentation layer. 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 58
- [Configure a Custom Domain for Your Community](#)
- [Rename the Chatter Tab](#)

#### IN THIS SECTION:

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

[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 Lightning Communities and Tabs + Visualforce Communities

 **Note:** The Koa and Kokua templates are starting a phased retirement. In Summer '17, you can no longer use these templates to create communities. Salesforce still supports existing communities that were built using Koa and Kokua. To create a community based on Koa or Kokua, contact Salesforce Support. However, we recommend that you work with Salesforce Support on a plan to replace your existing Koa and Kokua communities. New Lightning communities provide richer support for Knowledge and case management.

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

So which option should you use? Well, that depends on your skills and the needs of your organization.

### Lightning Communities

Community Builder is an intuitive, convenient tool for creating and customizing your Lightning community. Create a Lightning community based on a preconfigured template, and then apply branding, edit pages, update your template, and publish changes all from one user-friendly interface. With Lightning communities you can:

- Create a responsive self-service community using the Customer Service (Napili) template. To create Partner communities, use Partner Central.
- Enjoy Lightning extensibility including new pages, new navigation items, custom layouts, new components, and access to the App Exchange.
- Design pixel-perfect, branded pages including your own CSS styles. Control the look and feel of the community with a custom theme layout and custom components.
- Create public pages that anyone can access, or add private pages that you can add as a tab within your community.
- Build and iterate quickly using drag-and-drop reusable page elements.
- Use ready-made forms to create web-to-lead forms or gather customer feedback.
- Create data-driven pages, such as product catalogs or other listings, using your organization's data.
- Easily support multi-lingual experiences through Translation Workbench and Community Builder.

- Reuse your Visualforce pages, actions, buttons, links, and canvas apps in Lightning communities.
- To create and export industry-specific solutions and use them to jump-start new communities, or package and distribute them for others, use Lightning Bolt solutions.

## Salesforce Tabs + Visualforce Communities

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

- Supports high volume authenticated visitors and concurrent transactions while maintaining low page-load times.
- Full support for older browsers such as IE 9.
- Force.com platform capabilities including analytics, workflow and approvals, and programmable logic.
- Integration of partner apps (managed packages) that use Visualforce.
- Community rendering with 3rd-party web application frameworks.
- Integration of 3rd-party libraries.
- Support for dynamic web applications, such as an event management application.
- Harness Visualforce to create private pages that you can add as a tab within your community.
- Write your own controllers, or extensions to controllers, using Apex code.
- Build dynamic web applications, such as an event management application.

## Features at a Glance

Still unsure which product to choose? Use this table to learn more about each product's features.

Feature	Lightning Communities	Tabs + Visualforce Communities
Public pages	✓	✓
Community templates (Koa, Kokua, Customer Service (Napili), Aloha, and Partner Central)*	✓	
Authenticated pages*	✓	✓
Lightning Bolt solutions	✓	
Visualforce pages (Add Visualforce pages to Lightning communities using the Visualforce Page component in Community Builder.)	✓	✓
Audience targeting for pages and groups (Customer Service (Napili) and Partner Central templates only)	✓	
Custom theme layouts and pixel-perfect designs (Customer Service (Napili) and Partner Central template only)	✓	✓
Out-of-the-box login, logout, self-registration, and error pages	✓	✓
Drag-and-drop environment	✓	

Feature	Lightning Communities	Tabs + Visualforce Communities
Reusable components	✓	
IP restrictions	✓	✓
Access to data, such as cases, leads, and opportunities	✓	✓
Ready-made forms	✓	
Analytics and reports	✓	✓
Programmatic page creation (using Apex, APIs, and controllers)		✓
Web applications		✓
Workflows		✓
Full Force.com platform capability		✓

\*Available in Community Builder for Communities users only.

#### 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.



**Note:** The Koa and Kokua templates are starting a phased retirement. In Summer '17, you can no longer use these templates to create communities. Salesforce still supports existing communities that were built using Koa and Kokua. To create a community based on Koa or Kokua, contact Salesforce Support. However, we recommend that you work with Salesforce Support on a plan to replace your existing Koa and Kokua communities. New Lightning communities provide richer support for Knowledge and case management.

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:

#### 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.

**Partner Central**

A flexible, responsive template designed for channel sales workflows. Recruit, build, and grow your partner network to drive channel sales and marketing together in a branded online space. Easily configure lead distribution, deal registration, and marketing campaigns. Share training materials and sales collateral in a central space, and use reports to track your pipeline.

**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.

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 245.
  - [Edit community pages and page components](#).

To learn more about using the Kokua, Koa, Customer Service (Napili), and Partner Central templates, see the [Using Templates to Build Communities](#) guide.

## SEE ALSO:

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

## Use Community Builder (Site.com) Without Templates

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

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

### Before You Begin

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

See About Site.com User Roles.

### Tips and Considerations

- Communities users with the "Create and Set Up Communities" permission are assigned the role of site administrator in a community's Site.com site. However, they don't appear in the User Roles section on the Overview tab of Site.com Studio.
- You can't create, delete, or duplicate community sites in Site.com.

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

SEE ALSO:

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

## 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 Lightning Communities and Tabs + Visualforce Communities](#)

## 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.
- 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.

- Open [Community Workspaces](#) or [Community Management](#).
- Navigate to **Administration > Pages**.
- Click  next to **Service Not Available** to search for and select your custom page.
- 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`).

#### 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 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.

Domains that have a custom URL with a root path prefix use that site's Service Not Available page for paths on the domain that aren't custom URLs of other sites that have their own Service Not Available pages.

For example, sites `http://www.example.com/` and `http://www.example.com/site1` have assigned Service Not Available pages. Site `http://www.example.com/site2` does not have an assigned Service Not Available page.

Requests to `http://www.example.com/`, `http://www.example.com/Page1`, and `http://www.example.com/site2` display the Service Not Available page assigned to `http://www.example.com/`.

Requests to `http://www.example.com/site1` and `http://www.example.com/site1/Page1`, display the Service Not Available page assigned to `http://www.example.com/site1`.

If a site does not have an assigned Service Not Available page, and the sites of parent custom URLs in the same domain also don't have assigned Service Not Available pages, the Maintenance page is displayed.


#### 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**.

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](#)

#### 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

## 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:

```
public with sharing class CommunitiesLandingController {
    // Code we will invoke on page load.
    public PageReference forwardToStartPage() {
        String communityUrl = 'https://universaltelcom.force.com';
        String customHomePage = '/apex/hello';
        if (UserInfo.getUserType().equals('Guest')) {
            return new PageReference(communityUrl + '/login?startURL=' +
EncodingUtil.urlEncode(customHomePage, 'UTF-8'));
        } else {
            return Network.communitiesLanding();
        }
    }
    public CommunitiesLandingController() {}
}
```

4. Replace `https://universaltelcom.force.com` with the URL for your community.

### 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

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 responsive communities for delivering rich, branded spaces for your customers and partners.

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

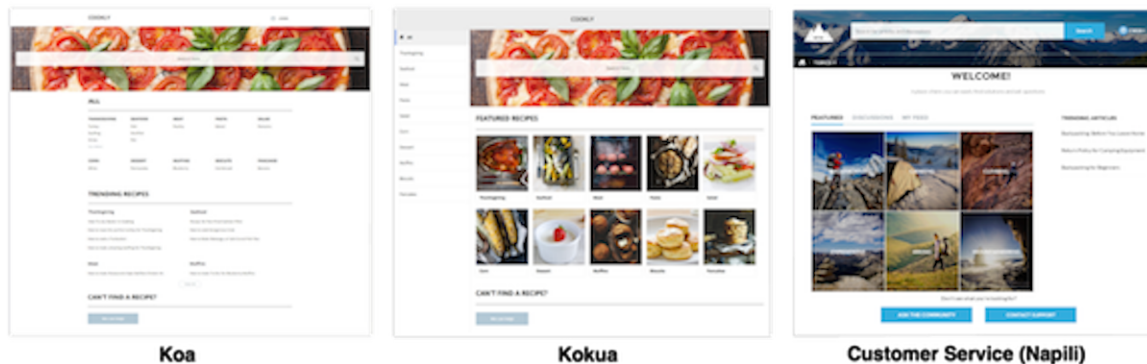
### Customer Communities

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 Customer Service (Napili) communities. 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



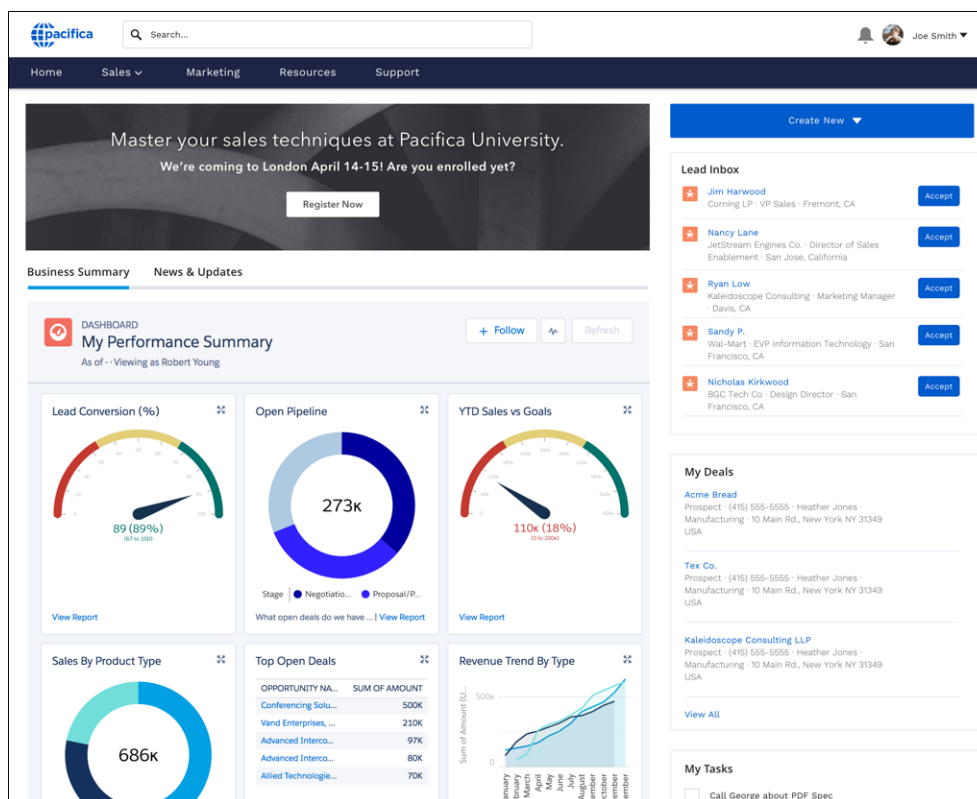
A wizard guides you through selecting a template and then walks you through the initial setup, including topic and data category setup.

- 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.

**Note:** The Koa and Kokua templates are starting a phased retirement. In Summer '17, you can no longer use these templates to create communities. Salesforce still supports existing communities that were built using Koa and Kokua. To create a community based on Koa or Kokua, contact Salesforce Support. However, we recommend that you work with Salesforce Support on a plan to replace your existing Koa and Kokua communities. New Lightning communities provide richer support for Knowledge and case management.

### Partner Communities

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



## IN THIS SECTION:

### [Compare Features Available in Community Templates](#)

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

### [Objects Supported by Out-of-the-Box Components and Pages in Community Templates](#)

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

### [Customer Service \(Napili\) Community—Setup Checklist](#)

Building a community is the result of research, mapping of goals, and defining your audience. At the same time, you must have all your ducks in a row so the actual implementation process is seamless. You know your org best, but use this general checklist to help you organize what you need for a community using the Customer Service (Napili) template.

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

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

## SEE ALSO:

[Create Communities](#)

[Compare Features Available in Community Templates](#)

## Compare Features Available in Community Templates

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

### Feature Comparison



**Note:** The Koa and Kokua templates are starting a phased retirement. In Summer '17, you can no longer use these templates to create communities. Salesforce still supports existing communities that were built using Koa and Kokua. To create a community based on Koa or Kokua, contact Salesforce Support. However, we recommend that you work with Salesforce Support on a plan to replace your existing Koa and Kokua communities. New Lightning communities provide richer support for Knowledge and case management.

#### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

	Customer Service (Napili)	Partner Central	Salesforce Tabs + Visualforce	Koa	Kokua
Most standard Salesforce objects			✓		
Accounts	✓	✓	✓		
Campaigns	✓	✓	✓		
Cases	✓	✓	✓	✓	✓
Community Builder	✓	✓		✓	✓
Community Discussions	✓	✓	✓		
Contacts and Shared Contacts	✓	✓	✓		
Contacts to Multiple Accounts			✓		
Custom Objects	✓	✓	✓		
Customizations using Lightning Components	✓	✓		✓	✓
Customizations using Visualforce	✓	✓	✓		
Salesforce Knowledge	✓ Recommended		✓ Recommended	✓ Required	✓ Required
Knowledgeable People	✓		✓		
Leads	✓	✓	✓		

	Customer Service (Napili)	Partner Central	Salesforce Tabs + Visualforce	Koa	Kokua
Notes	✓	✓	✓		
Opportunities	✓	✓	✓		
Optimized for Mobile	✓	✓	✓	✓	✓
Orders			✓		
Question-to-Case	✓				
Recommendations	✓	✓			
Reputation	✓				
Topics	✓	✓	✓		
Trending Articles	✓			✓	✓
Visualforce Page (Add Visualforce pages to Lightning communities using the Visualforce Page component in Community Builder.)	✓	✓			

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 style="list-style-type: none"> <li>• <b>Headline</b></li> <li>• <b>Record Banner</b></li> <li>• <b>Record Detail</b></li> <li>• <b>Record Information Tabs</b></li> <li>• <b>Related Records</b></li> </ul>	<ul style="list-style-type: none"> <li>• <b>Navigation Menu</b></li> <li>• <b>Object Home Page</b></li> </ul>	<ul style="list-style-type: none"> <li>• <b>Create Record Button</b></li> <li>• <b>Create Record Form</b></li> </ul>
Account (Account)	✓	✓	✓

	<ul style="list-style-type: none"> <li>• <b>Headline</b></li> <li>• <b>Record Banner</b></li> <li>• <b>Record Detail</b></li> <li>• <b>Record Information Tabs</b></li> <li>• <b>Related Records</b></li> </ul>	<ul style="list-style-type: none"> <li>• <b>Navigation Menu</b></li> <li>• <b>Object Home Page</b></li> </ul>	<ul style="list-style-type: none"> <li>• <b>Create Record Button</b></li> <li>• <b>Create Record Form</b></li> </ul>
Activity History (ActivityHistory)	✓		
Approval History (ProcessInstanceHistory)	✓		
Approval Process Work Item (ProcessInstanceWorkitem)	✓		✓
Approval Step (ProcessInstanceStep)	✓		
Asset (Asset)	✓	✓	✓
Campaign (Campaign)	✓	✓	✓
Campaign Member (CampaignMember)	✓	✓	✓
Case (Case)	✓	✓	✓
Contact (Contact)	✓	✓	✓
Custom Objects	✓	✓	✓
Dashboard (Dashboard)	✓	✓	
Email Message (EmailMessage)	✓		
Event (Event)	✓		✓
External Objects	✓	✓	✓
Group (CollaborationGroup)	✓		✓
Lead (Lead)	✓	✓	✓
Note (Note and NoteAndAttachment)	✓		✓
Open Activity (OpenActivity)	✓		
Opportunity (Opportunity)	✓	✓	✓
Opportunity Contact Role (OpportunityContactRole)	✓		✓
Opportunity Product (OpportunityLineitem)	✓		

	<ul style="list-style-type: none"> <li>• <b>Headline</b></li> <li>• <b>Record Banner</b></li> <li>• <b>Record Detail</b></li> <li>• <b>Record Information Tabs</b></li> <li>• <b>Related Records</b></li> </ul>	<ul style="list-style-type: none"> <li>• <b>Navigation Menu</b></li> <li>• <b>Object Home Page</b></li> </ul>	<ul style="list-style-type: none"> <li>• <b>Create Record Button</b></li> <li>• <b>Create Record Form</b></li> </ul>
Opportunity Team Member (OpportunityTeamMember)	✓		
Product (Product2)	✓	✓	✓
Report (Report)	✓	✓	
Service Appointment (ServiceAppointments)	✓	✓	
Service Contract (ServiceContract)	✓	✓	
Shared Contacts (AccountContactRelationship)	✓		✓
Task (Task)	✓	✓	✓
User (User)	✓		✓
Work Order (WorkOrder)	✓	✓	✓
Work Order Line Item (WorkOrderLineItem)	✓		✓



**Note:** To be searchable in communities, objects must be [searchable in Lightning Experience](#) and supported in community templates.

## Customer Service (Napili)Community—Setup Checklist

Building a community is the result of research, mapping of goals, and defining your audience. At the same time, you must have all your ducks in a row so the actual implementation process is seamless. You know your org best, but use this general checklist to help you organize what you need for a community using the Customer Service (Napili) template.

Have you considered everything on these lists?

### Before you begin:

*Gather your branding assets:*

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

#### 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 and Snap-ins.
- ☐ Review [profiles](#) and add [permission sets](#) as needed.
- ☐ [Set up Web-to-Case](#).

If you're using Salesforce Knowledge:

- ☐ Review your [data categories](#).
- ☐ Enable [feed tracking](#) for your Knowledge article types.

## As You're Making Your Community:

*In your internal Salesforce org:*

- ☐ [Add members to your community](#).

Configure the Guest User Profile (access using Community Management or the Community Builder):

- ☐ Give read and create permissions for the case object.
- ☐ If using Salesforce Knowledge, give guests access to your data categories.

*In Community Management or Community Workspaces:*

- ☐ [Set up navigational topics and subtopics](#), and associate articles to each topic.
- ☐ [Set up featured topics and associated images](#)
- ☐ [Download the latest Salesforce Communities Management](#) from the AppExchange.
- ☐ [Set up moderation criteria and rules](#).
- ☐ Enable and set up [reputation](#).

*In Community Builder:*

- ☐ [Customize your community to match your company's branding](#).
- ☐ [Add standard and custom Lightning components to customize their design and content](#).

## After Making Your Community

- ☐ Set up an internal Chatter group for feedback, and invite people to take a test drive while the community is still in preview mode.
- ☐ Incorporate their feedback, and then [publish your community](#).
- ☐ Seed the community with some initial content: welcome posts, groups, and relevant or fun articles.

## Which Components Can I Use with Each Template?

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



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

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

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

Component	Customer Service (Napili) and Lightning Bolt Solutions	Partner Central	Koa	Kokua	Available in Versions
Create Case Form	✓		✓	✓	All versions
Create Record Button	✓	✓			Winter '16 and later
Create Record Form	✓	✓			Winter '16 and later
Dashboard	✓	✓			Winter '16 and later
Dashboard List	✓	✓			Winter '16 and later
Expanded Category Navigation			✓	✓	All versions
Featured Data Categories			✓	✓	All versions
Featured Search			✓	✓	All versions
Featured Topics	✓				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 Box	✓	✓			All versions
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

Component	Customer Service (Napili) and Lightning Bolt Solutions	Partner Central	Koa	Kokua	Available in Versions
<a href="#">HTML Editor</a>	✓	✓	✓	✓	All versions
<a href="#">Knowledgeable People</a>	✓				Summer '15 and later
<a href="#">Language Picker</a>	✓	✓	✓	✓	Winter '16 and later
<a href="#">Lead Inbox</a>		✓			Summer '17 and later
<a href="#">Message Notification</a>	✓				Spring '17 and later
<a href="#">Navigation Bar</a>	✓				Before Winter '16
<a href="#">Navigation Menu</a>	✓				Winter '16 and later
<a href="#">New Message Button</a>	✓				Spring '17 and later
<a href="#">Path</a>	✓	✓			Winter '16 and later
<a href="#">Profile Header</a>	✓		✓	✓	All versions
<a href="#">Recommendations</a>	✓	✓			Summer '15 and later
<a href="#">Record Banner</a>	✓	✓			Winter '16 and later
<a href="#">Record Information Tabs</a>	✓	✓			Winter '16 and later
<a href="#">Record List</a>	✓	✓			Winter '16 and later
<a href="#">Record Related List</a>	✓	✓			Winter '16 and later
<a href="#">Related Articles List</a>	✓				Summer '16 and later
<a href="#">Related Questions List</a>	✓				Summer '16 and later
<a href="#">Related Topics List</a>	✓				Spring '15 and later
<a href="#">Report Chart</a>	✓	✓			Winter '16 and later
<a href="#">Report List</a>	✓	✓			Winter '16 and later
<a href="#">Report Summary</a>	✓	✓			Winter '16 and later
<a href="#">Reputation Leaderboard</a>	✓				Spring '15 and later
<a href="#">Rich Content Editor</a>	✓	✓	✓	✓	Winter '16 and later

Component	Customer Service (Napili) and Lightning Bolt Solutions	Partner Central	Koa	Kokua	Available in Versions
<a href="#">Scroll To</a>	✓				All versions
<a href="#">Search</a>			✓	✓	All versions
<a href="#">Search &amp; Post Publisher</a>	✓				All versions
<a href="#">Search Results</a>	✓				All versions
<a href="#">Set Case Status Button</a>	✓		✓	✓	All versions
<a href="#">Snap-ins Chat</a>	✓				Summer '17 and later
<a href="#">Tabs</a>	✓	✓			Winter '16 and later
<a href="#">Toggle Button</a>			✓	✓	All versions
<a href="#">Top Article by Topic</a>	✓				Winter '16 and later
<a href="#">Topic Catalog</a>	✓				Spring '16 and later
<a href="#">Topic Description</a>	✓				Spring '16 and later
<a href="#">Topic Metrics</a>	✓				Winter '16 and later
<a href="#">Trending Articles</a>			✓	✓	All versions
<a href="#">Trending Articles by Topic</a>	✓				All versions
<a href="#">Trending Topics</a>	✓				Spring '15 and later
<a href="#">Unanswered Questions</a>	✓				Winter '16 and later
<a href="#">User Profile</a>	✓	✓			Spring '16 and later
<a href="#">User Profile Detail</a>	✓				Winter '16 only
<a href="#">User Profile Image</a>	✓	✓	✓	✓	All versions
<a href="#">User Profile Knowledgeable About</a>	✓				Winter '16 and later
<a href="#">User Profile Related List</a>	✓	✓			Spring '16 and later

Component	Customer Service (Napili) and Lightning Bolt Solutions	Partner Central	Koa	Kokua	Available in Versions
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
Wave Dashboard	✓				Summer '17 and later
<b>CUSTOM COMPONENTS</b>					
Custom Lightning Components	✓	✓	✓	✓	Winter '16 and later

 **Note:**


- <sup>1</sup> 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.

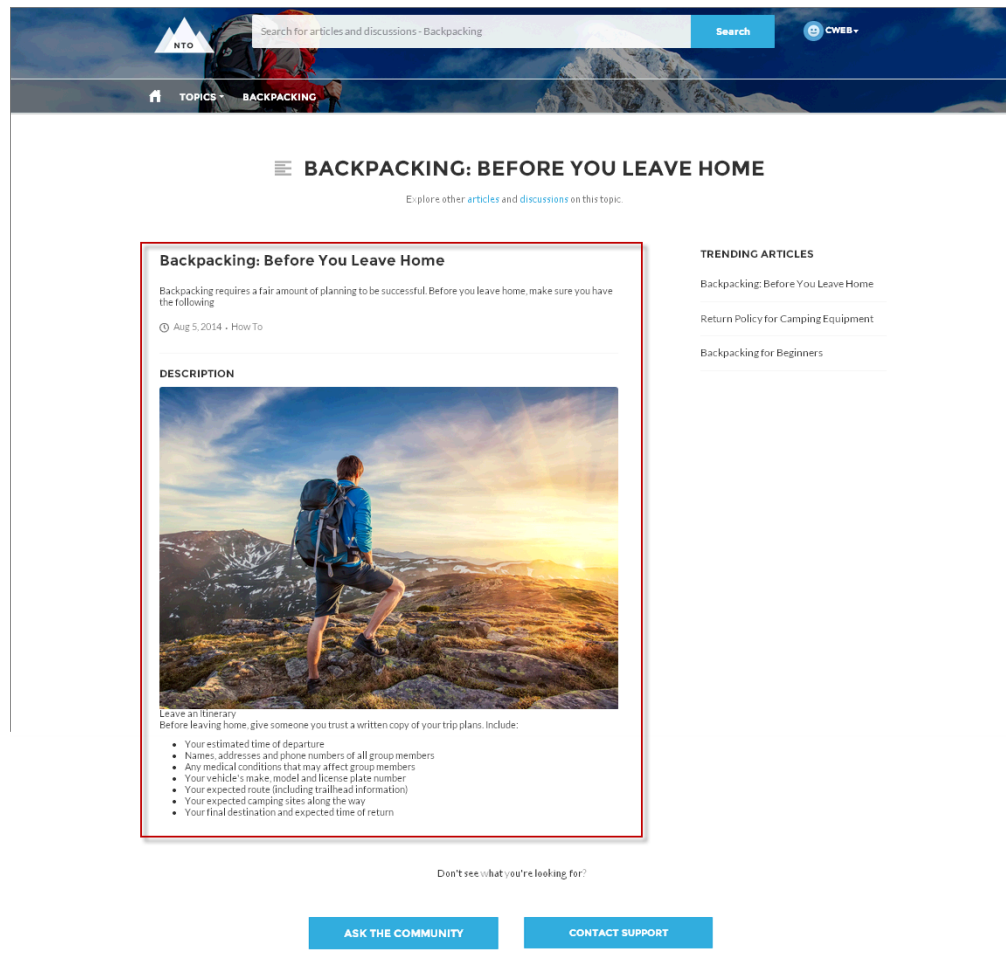
If you enable article voting for this component, authenticated users see a prompt to vote below each article. Users can give articles a thumbs up or thumbs down vote. If your organization uses star rating on articles, thumbs up votes are recorded as five stars and thumbs down votes are recorded as one 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 <code>Was this article helpful?</code> 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 <code>Thanks for voting.</code> 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

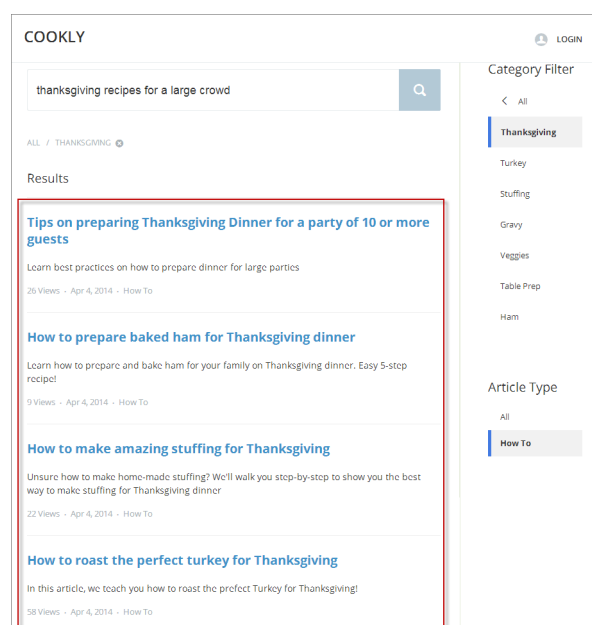
The Article List component lets users view articles that result from a search or from filtering without needing to leave the page.

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?](#)

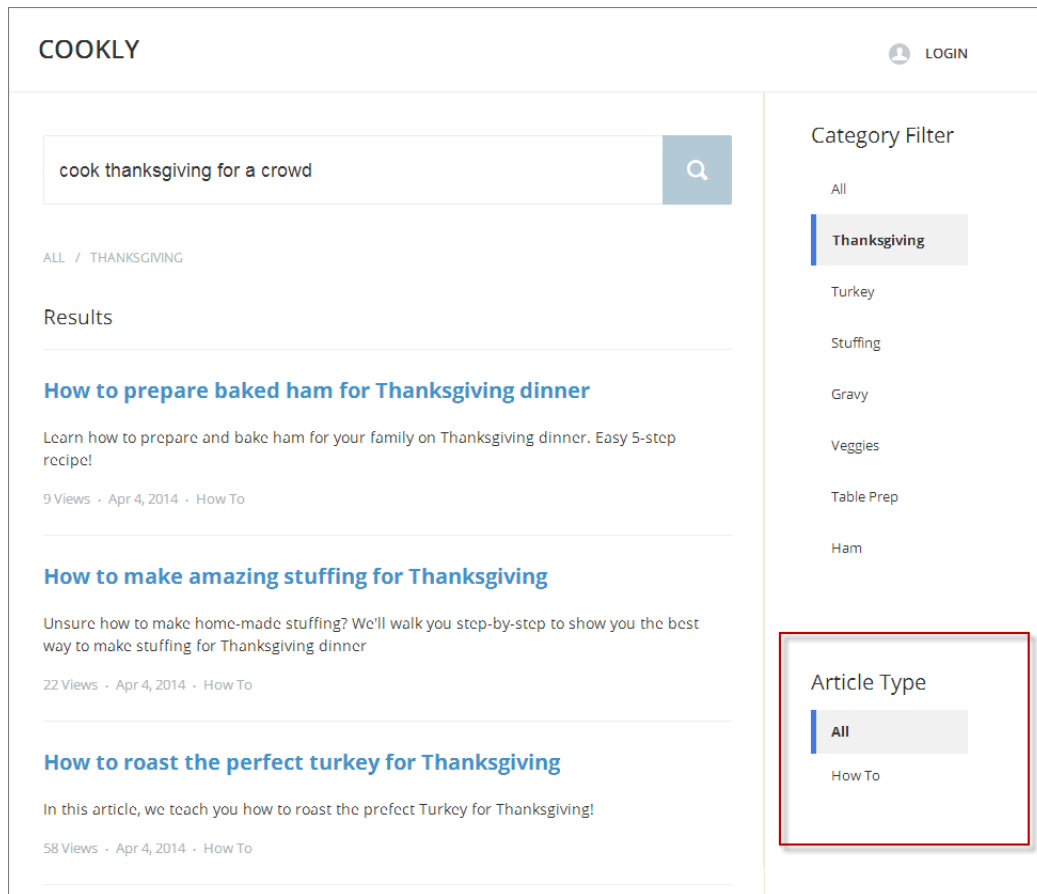
## Article Type Filter

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.

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

There are no properties to set for this component.

 **Example:** Sample Article Type Filter:



SEE ALSO:

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

## Article Content

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

The article's title, latest revision date, and article type appear with the body of the article.



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

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

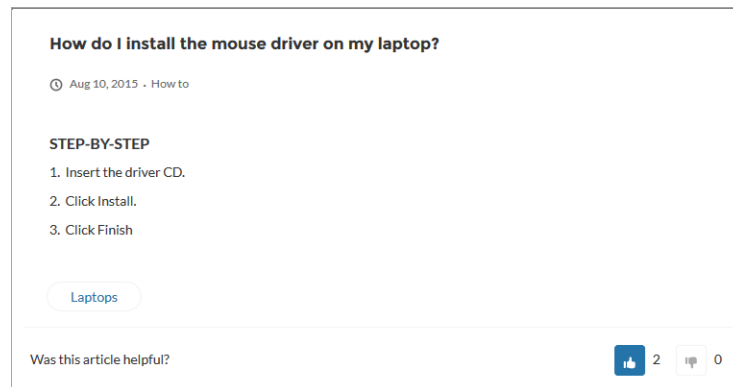
When a user votes on an article, a confirmation message appears next to their vote. The user can return to the article later to view their vote, but can't change it or see voting data from other community members. You can view an article's voting data at the top of the article in your organization.

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

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

Property	Details
Record Id	This value is retrieved when the individual article is selected.
URL Name	This value is retrieved when the individual article is selected.
Show title in the article header	Select this option to show the title in the article's header.
Allow voting on articles	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.

 **Example:** Sample Article Content component:



SEE ALSO:

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

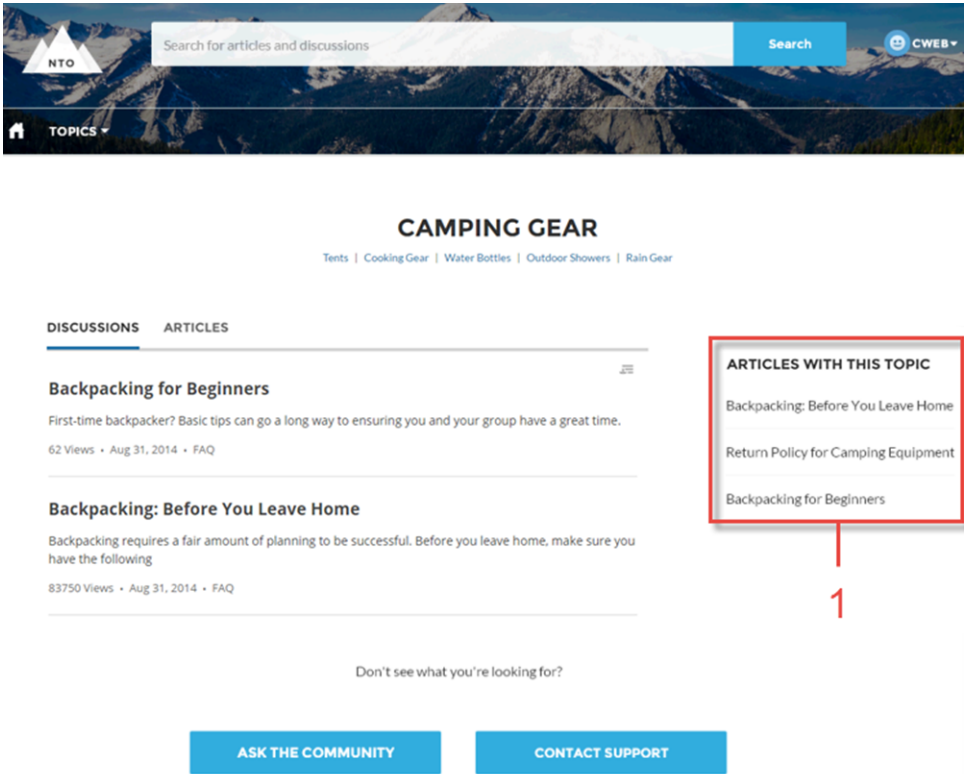
## Articles with This Topic

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 <code>Articles With This Topic</code> .
Show Title	Show the title by checking this box.
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:



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.

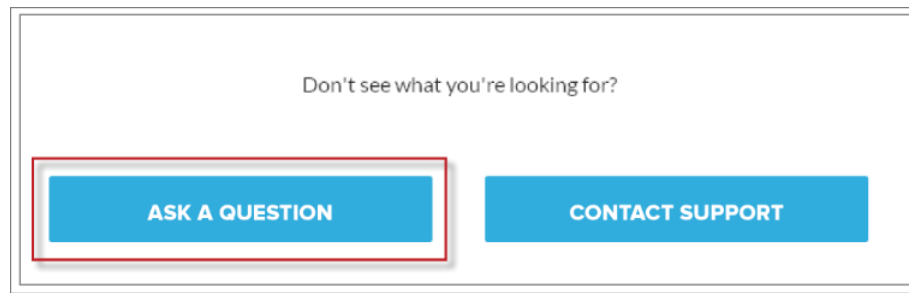
 **Note:** Before Spring '16, this component was named Ask the Community.

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.

 **Example:** Sample Ask Button component:



SEE ALSO:

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

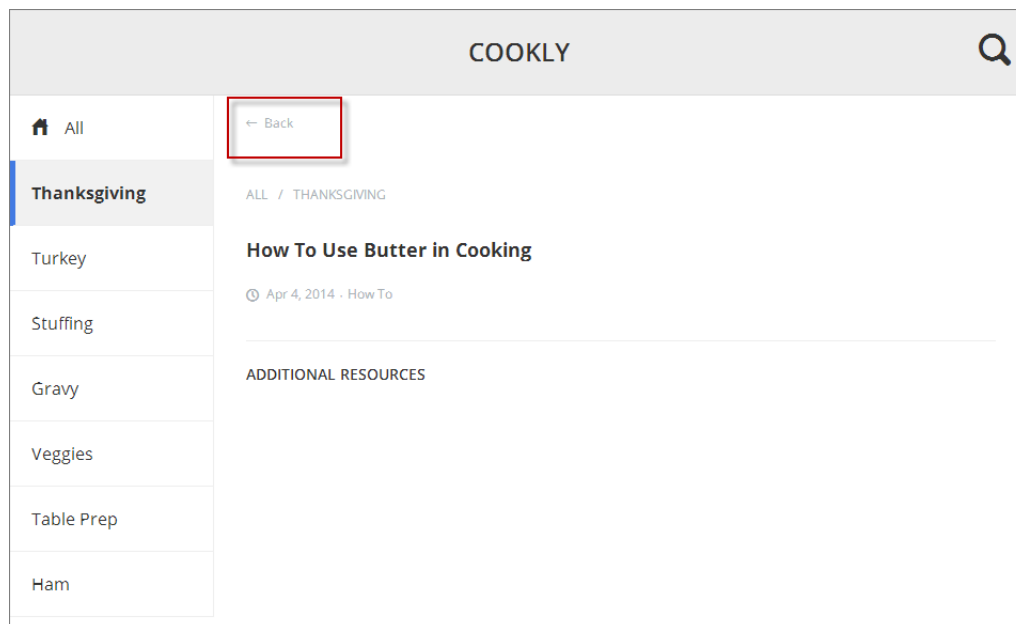
## Back Button

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

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

There are no properties to set for this component.

 **Example:** Sample Back Button component:



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 <code>{!topicID}</code> on topic pages, <code>{!feedItemID}</code> on question or feed item pages, and <code>{!urlName}</code> 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.



**Note:** This component is scheduled for retirement in all Salesforce orgs in the Summer '19 release. Starting Summer '17, new communities can't use this component. Communities already using the component can still use it, but if you delete the component or the page containing it, you can't use it again. Instead, use one of the generic record components and associate it with the case object.

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



**Note:**

- You can't attach a file to a case while in Preview mode in Community Builder. When the community is published, you can attach files to cases.
- For users to see case attachments, the Case page layout and case record types for their profile must include the Attachments related list.

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


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:

Where are the Christmas cookie recipes?  
Medium • New • 00001053

Write a new comment...

Comment

 Jon Amos • Apr 14, 2014

I looked all over the site. I'm looking for the recipe for the cake in the picture.

Resolve Case

**CASE DETAILS**


**Case Owner**  
Jon Amos

**Case Number**  
00001053

**Contact Name**  
Jon Amos

[View All](#)

**ATTACHMENTS (1)**


 IMG\_0464.JPG

SEE ALSO:

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


## Case Banner

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

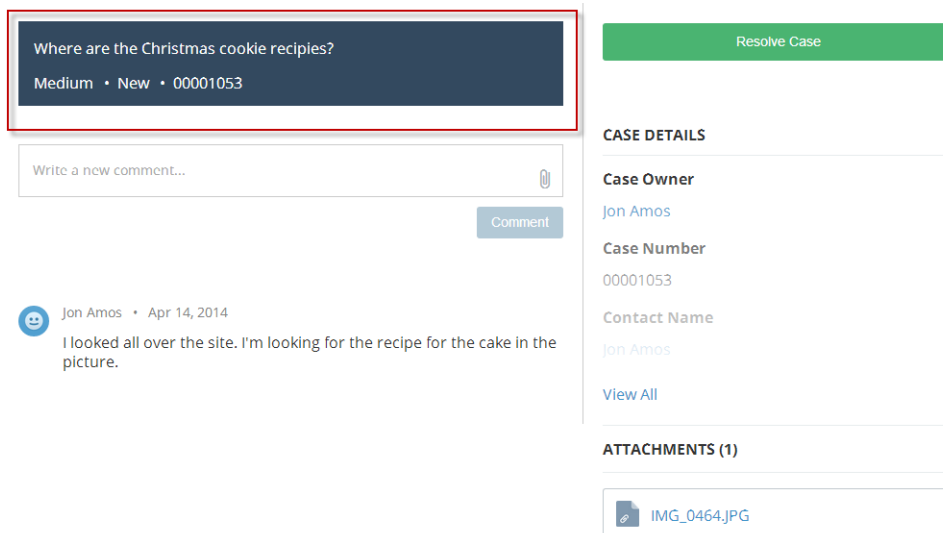
 **Note:** This component is scheduled for retirement in all Salesforce orgs in the Summer ‘19 release. Starting Summer ‘17, new communities can’t use this component. Communities already using the component can still use it, but if you delete the component or the page containing it, you can’t use it again. Instead, use one of the generic record components and associate it with the case object.

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

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.

 **Note:** Before Spring ‘16, this component was named Case Highlights.

 **Example:** Sample Case Banner component:




SEE ALSO:


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

## Case Comments

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

 **Note:** This component is scheduled for retirement in all Salesforce orgs in the Summer '19 release. Starting Summer '17, new communities can't use this component. Communities already using the component can still use it, but if you delete the component or the page containing it, you can't use it again. Instead, use one of the generic record components and associate it with the case object.

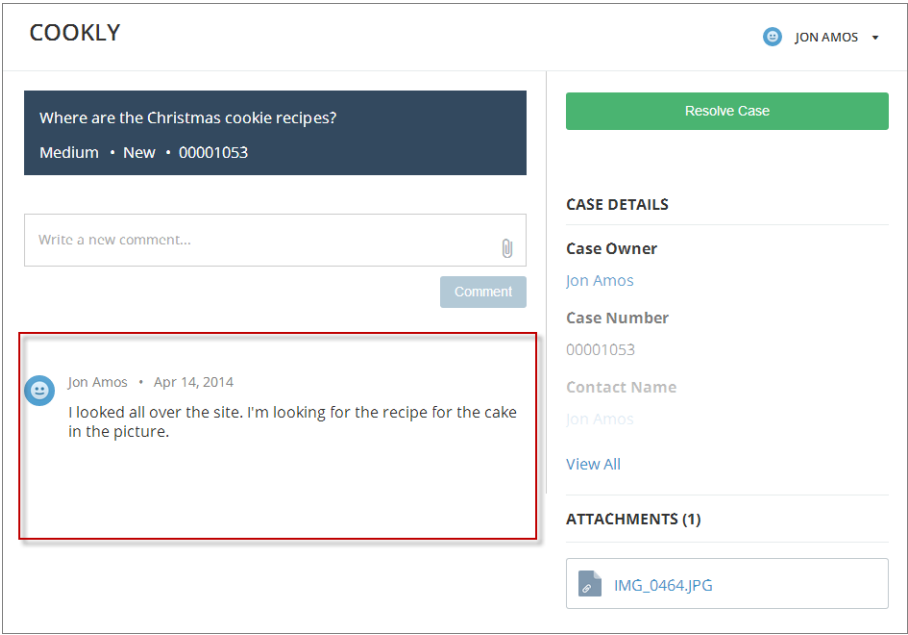
If an attachment has been uploaded with a comment it is shown separately in the Attachments component.

 **Note:** For users to see case comments, the Case page layout and case record types for their profile must include the Case Comments related list.

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

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 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.

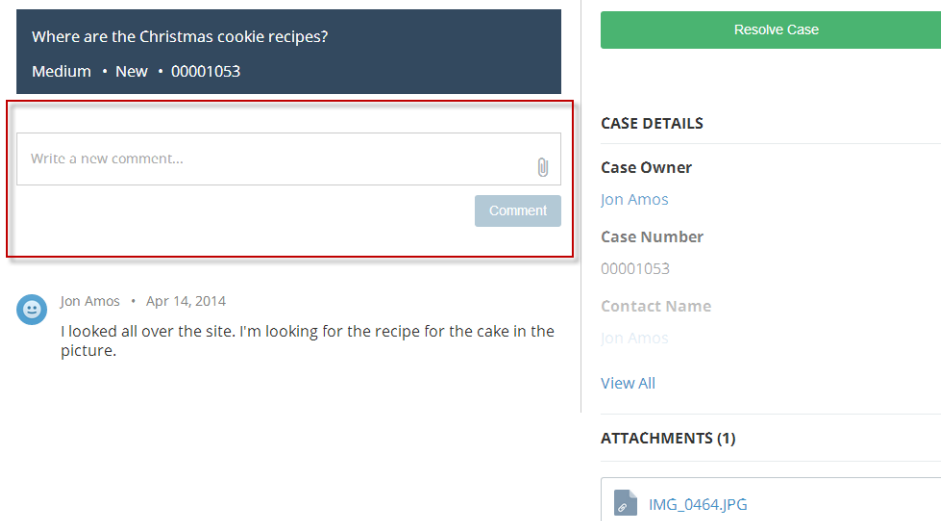
By default, users can attach any supported file type that is 5 MB or less. You can restrict the types of files that users can upload by changing the default values for content types on the Library tab.

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:

 **Note:** This component is scheduled for retirement in all Salesforce orgs in the Summer '19 release. Starting Summer '17, new communities can't use this component. Communities already using the component can still use it, but if you delete the component or the page containing it, you can't use it again. Instead, use one of the generic record components and associate it with the case object.


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 Detail component:

Where are the Christmas cookie recipes?  
Medium • New • 00001053

Write a new comment...

Comment

 Jon Amos • Apr 14, 2014

I looked all over the site. I'm looking for the recipe for the cake in the picture.

Resolve Case

CASE DETAILS

Case Owner

Jon Amos

Case Number


00001053

Contact Name

Jon Amos

View All


ATTACHMENTS (1)

 IMG\_0464.JPG


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.


 **Note:** This component is scheduled for retirement in all Salesforce orgs in the Summer '19 release. Starting Summer '17, new communities can't use this component. Communities already using the component can still use it, but if you delete the component or the page containing it, you can't use it again. Instead, use one of the generic record components and associate it with the case object.

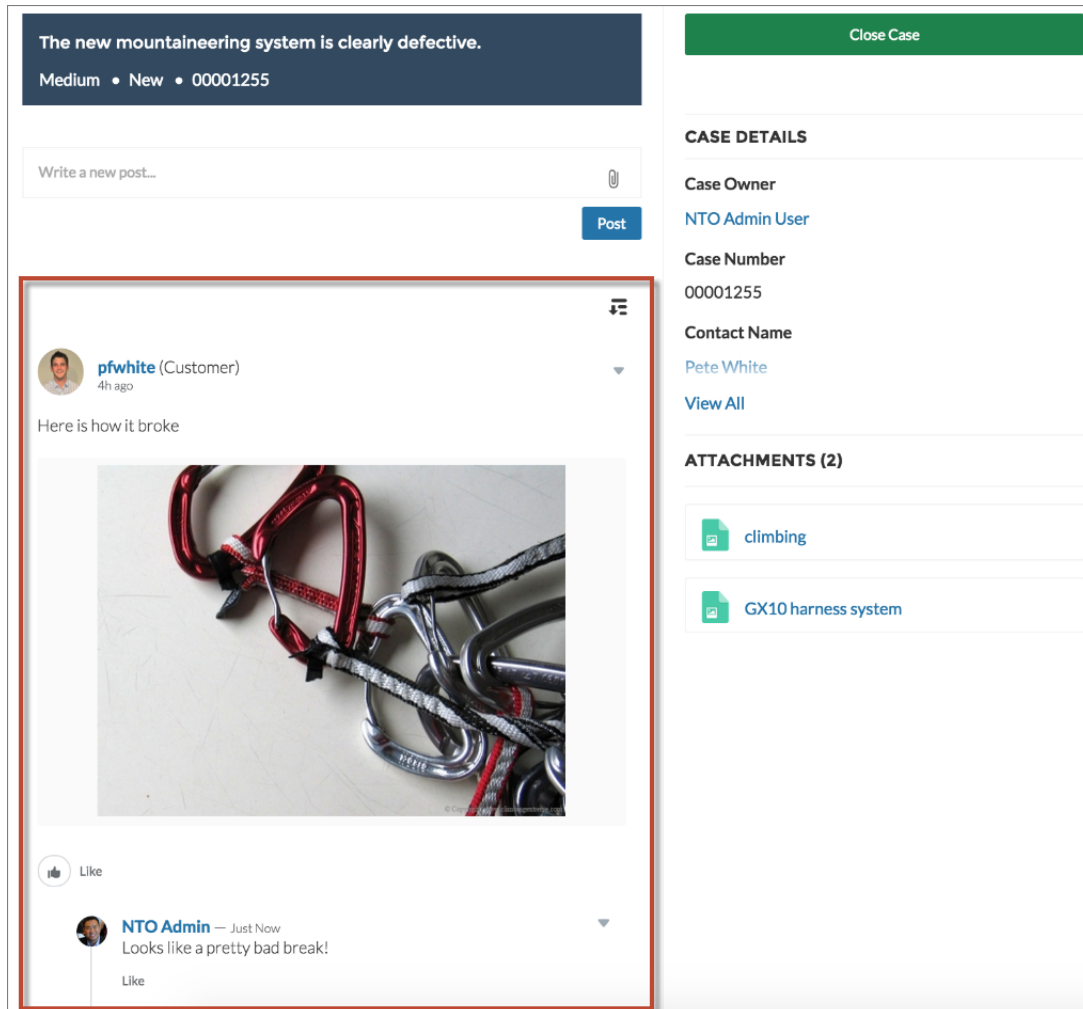
Comments and attachments on posts appear inline below the post for desktop and tablet users, and attachments are also shown separately in the Attachments component.

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


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


Property	Details
Case ID	Enter this value: <code>{!recordId}</code>

 **Example:** Sample Case Feed component:

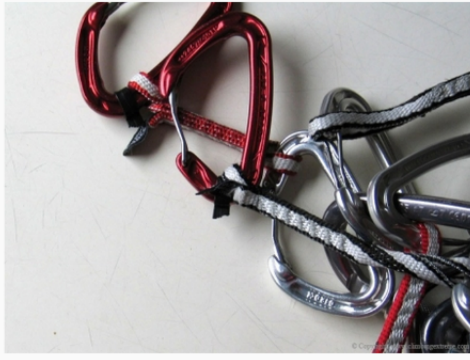



The new mountaineering system is clearly defective.  
Medium • New • 00001255


Write a new post...  **Post**

 **pfwhite** (Customer)  
4h ago

Here is how it broke



 Like

 **NTO Admin** — Just Now  
Looks like a pretty bad break!  
Like


**CASE DETAILS**


**Case Owner**  
NTO Admin User

**Case Number**  
00001255

**Contact Name**  
Pete White  
[View All](#)

**ATTACHMENTS (2)**

 climbing

 GX10 harness system


**Close Case**

SEE ALSO:

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

## Case Feed Publisher

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


 **Note:** This component is scheduled for retirement in all Salesforce orgs in the Summer '19 release. Starting Summer '17, new communities can't use this component. Communities already using the component can still use it, but if you delete the component or the page containing it, you can't use it again. Instead, use one of the generic record components and associate it with the case object.

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

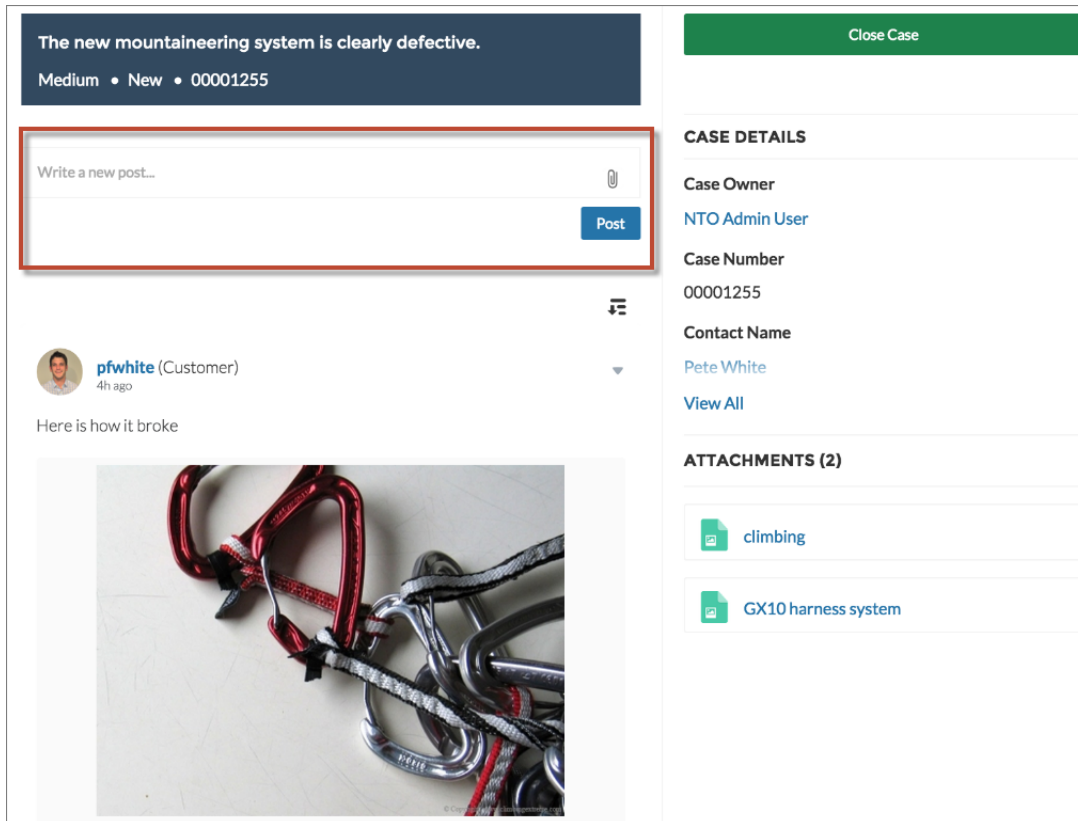
 **Important:**

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

Property	Details
Case ID	Enter this value: <code>{!recordId}</code>
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.

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

 **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.

 **Note:** This component is scheduled for retirement in all Salesforce orgs in the Summer '19 release. Starting Summer '17, new communities can't use this component. Communities already using the component can still use it, but if you delete the component or the page containing it, you can't use it again. Instead, use one of the generic record components and associate it with the case object.

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

 **Note:** The name of the first column in Case List displays as the case title on mobile devices. We recommend using `Subject` as the first column so mobile users can easily scan their cases. To change the column order in the Case List component, edit the case list view that your organization has assigned to it. By default, the Case List component uses the All Open Cases list view from Salesforce.

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

Property	Details
Case Filter Name or ID	Enter the name of the list view that displays cases.   <b>Note:</b> 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.

 **Note:** Before Spring '16, this component was named My Cases.

 **Example:** Sample Case List component:

ACTIVITY		CASES				
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

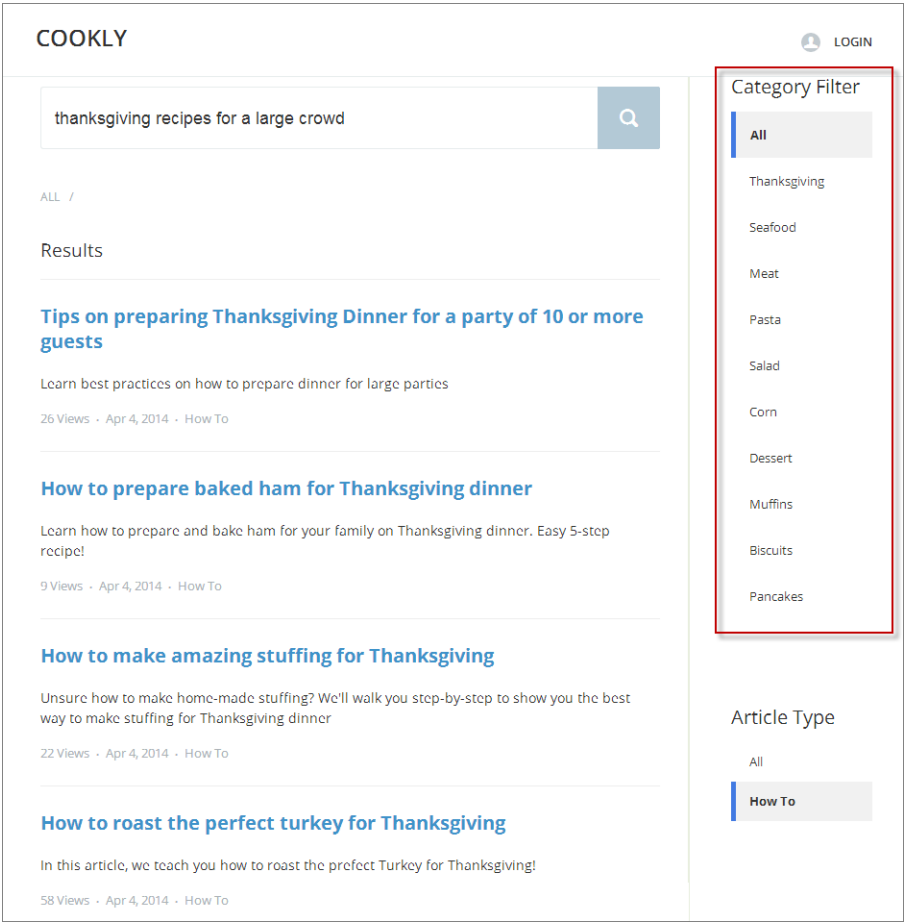
The Category Filter component lets users filter the article list based on selected data categories so that they can see articles from those categories only.

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:

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.

 **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.

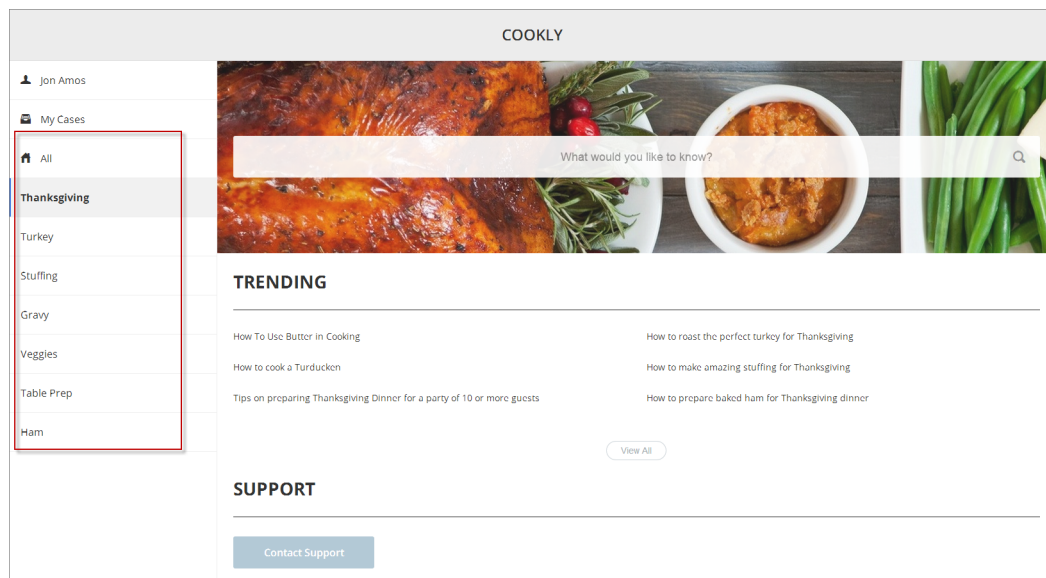
- 1. Select the **Category Navigation** component in the page you’re configuring.
- 2. In the property editor, configure properties for the component:

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?](#)

## CMS Connect

The CMS Connect component lets you display web content from a Content Management System (CMS). After setting up a connection in your CMS Connect workspace, drag a CMS Connect component on a page to render content from that connection's source.

Before using the CMS Connect component, set up a connection in your CMS Connect workspace. Then choose **Use in Builder** for the connection you want to use.

CMS Connections						New
6 connections • Sorted by: Load Order ⓘ						
NAME	CMS SOURCE	CSS	JAVASCRIPT	LANGUAGE	LOAD ORDER	
Capricorn	Other	✓	—	✓	1	▼
HerokuCMS	Other	✓	✓	—	2	CONNECTION Edit Use in Builder
Prudemo	AEM	✓	—	✓	3	

1. From Community Builder, drag a CMS Connect component to the place on the page where you want to display it.

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

Property	Details
CMS Source	Select the CMS source that contains the content you want to display. If no sources are listed, click <b>Manage Connections</b> to set one up.
Component Path	Enter the path to the component to display. If the connection has a root path, enter only the component part of the path. For example, if you entered <code>content/capricorn</code> for the root path, enter only <code>banner1</code> for the component path. If your connection doesn't have a root path, enter the full path for the component.

## 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.



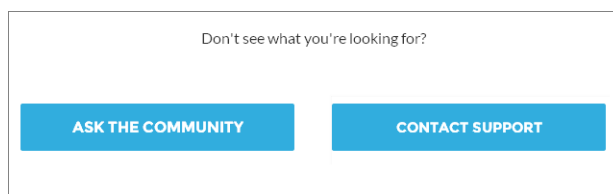
**Note:** Guest users can't attach files when creating a case.

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 <code>Ask a Question</code> .
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 <code>Contact Support</code> .



**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 <code>Don't see what you're looking for?</code> .
Ask Community Label	Text that appears on the button users click to start discussions in the community. The default text is <code>Ask A Question</code> .
Contact Support Label	Text that displays on the button that users click to contact support by creating a case. The default text is <code>Contact Support</code> .

 **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.

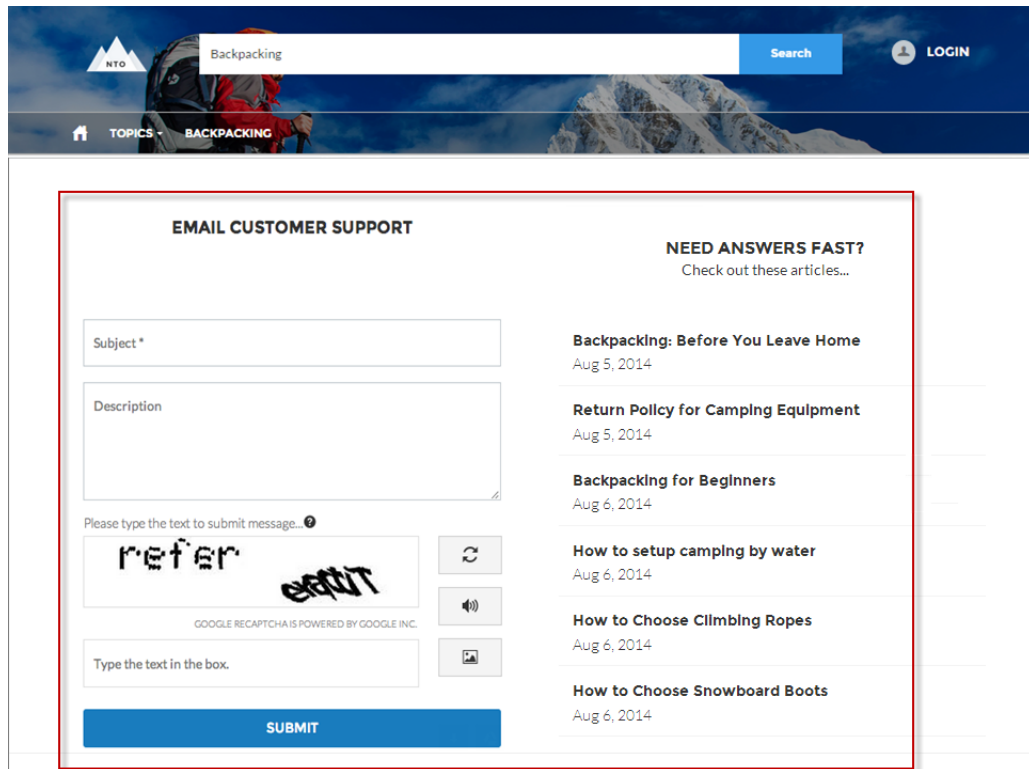
 **Note:** When you configure the case page layout for your community, specify that some fields are required. Adding required fields to the layout ensures that customers don't accidentally submit cases with empty fields.

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
<b>General Settings</b>	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.
<b>Actions in the Publisher</b>	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.
<b>Case Deflection</b>	Click to expand the section with case deflection properties.
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.
<b>reCAPTCHA Settings</b>	Click to expand the section with reCAPTCHA settings.
reCAPTCHA for Guest Case Creation	<p>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.</p> <p> <b>Note:</b> To use Google's reCAPTCHA service, go to the <a href="#">Google reCAPTCHA</a> 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</p>

Property	Details
	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.
	 <b>Note:</b> Make sure that you thoroughly test the reCAPTCHA widget in your production organization.

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



The screenshot shows a community page for "Backpacking" with a search bar and a "LOGIN" button. Below the header, there's a "TOPICS" section with "BACKPACKING" selected. The main content area is titled "EMAIL CUSTOMER SUPPORT" and contains a form for creating a case. The form includes fields for "Subject \*" and "Description", a reCAPTCHA widget, and a "SUBMIT" button. To the right of the form, there's a section titled "NEED ANSWERS FAST?" with a link to "Check out these articles...". Below this, there's a list of articles related to backpacking, including "Backpacking: Before You Leave Home", "Return Policy for Camping Equipment", "Backpacking for Beginners", "How to setup camping by water", "How to Choose Climbing Ropes", and "How to Choose Snowboard Boots".

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.

**PROPERTY EDITOR**

Create Record Button

Button Label

New

Global Actions

- 1x New Event
- 1x New Opportunity
- 1x New Lead
- 1x New Group

Add Global Action

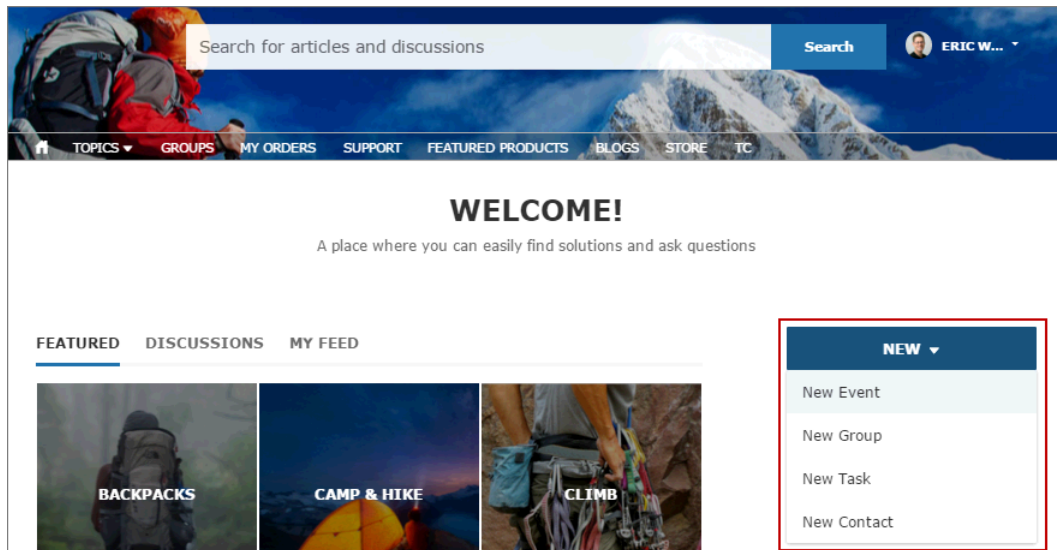
Global Action Properties

Global Action

- New Group
- Change Shipping Info
- New Case
- New Contact
- New Event
- New Group
- New Lead
- New Opportunity
- New Task
- New Order
- Your Order Information



**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">
```

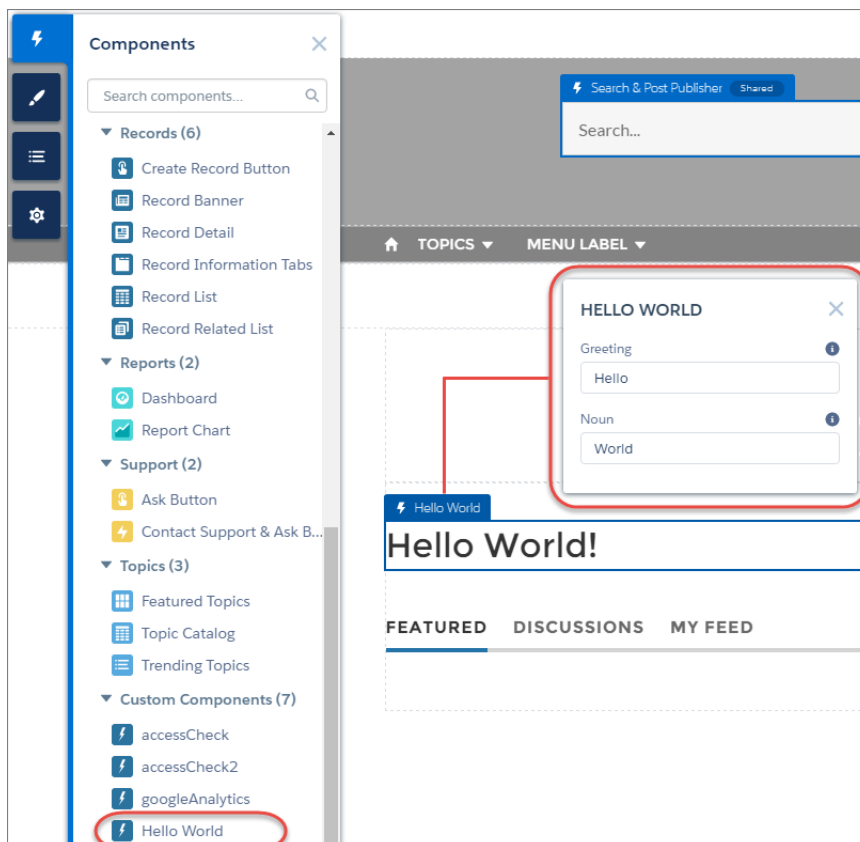
- To make the component's properties editable in Community Builder, include a design resource named `componentName.design` with your Lightning component bundle.

 **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.

 **Example:** A custom component added to the page canvas, with properties open in the floating component property editor:



### 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

## Dashboard

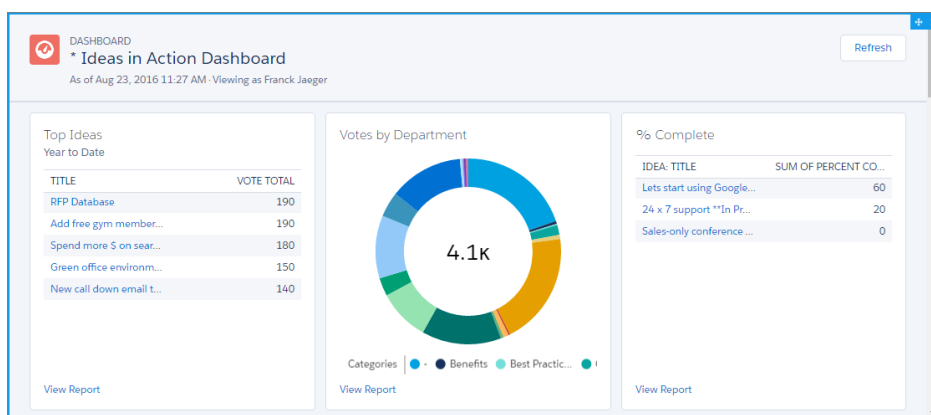
Use the Dashboard component to drag and drop dashboards you set up in your org's public folder to your community's pages.

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.



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



**Example:** Sample Dashboard List component:

[insert image]

## Expanded Category Navigation

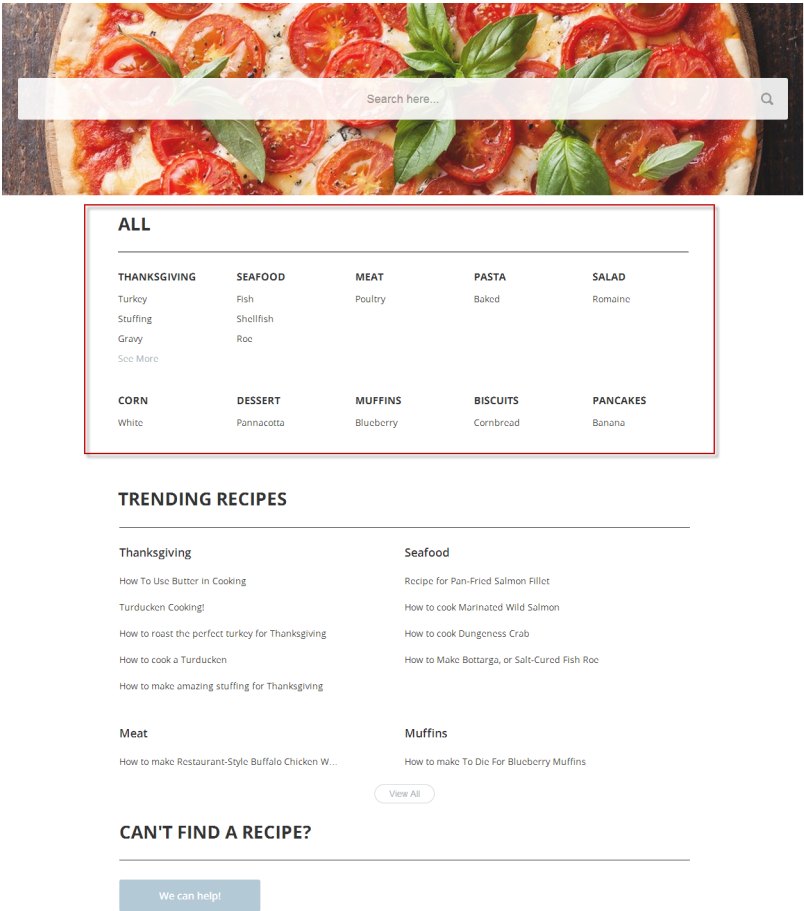
The Expanded Category Navigation component organizes articles based on a hierarchy of categories.

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 <i>Desserts</i> , you can change the text to <i>Easy Dessert Recipes</i> . 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.

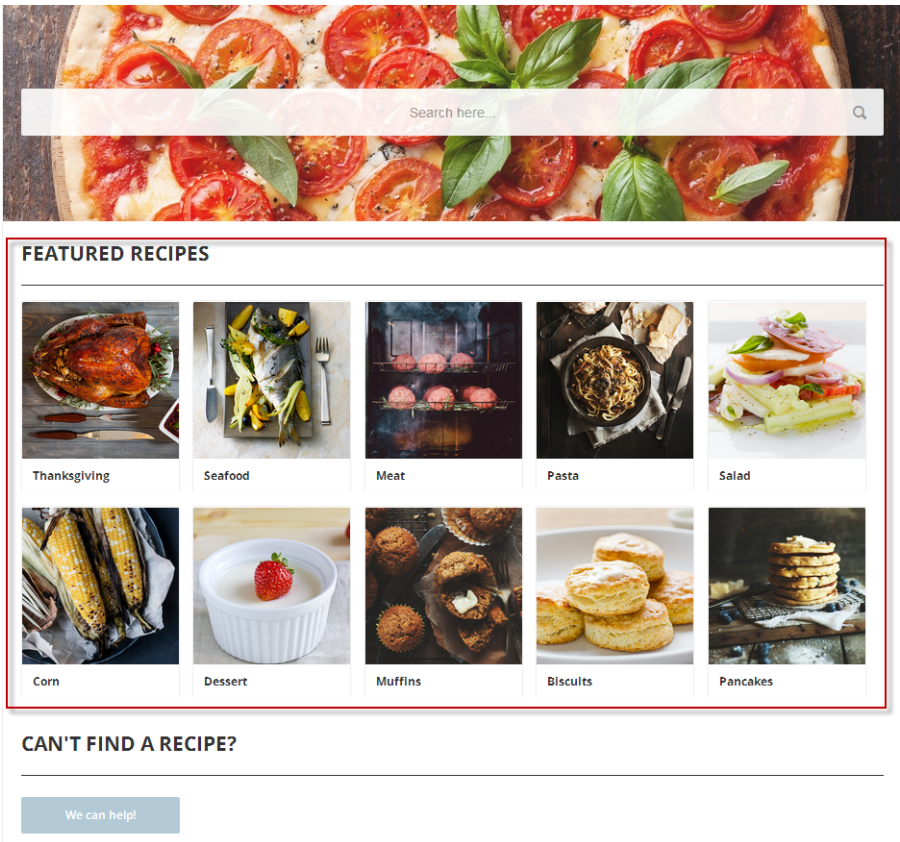
Images help your users select which group of articles they'd like to browse. You can set properties to choose the number of categories displayed on the page.

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 <code>{!Global.PathPrefix}/{!DataCategory.Name}.jpg</code> 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

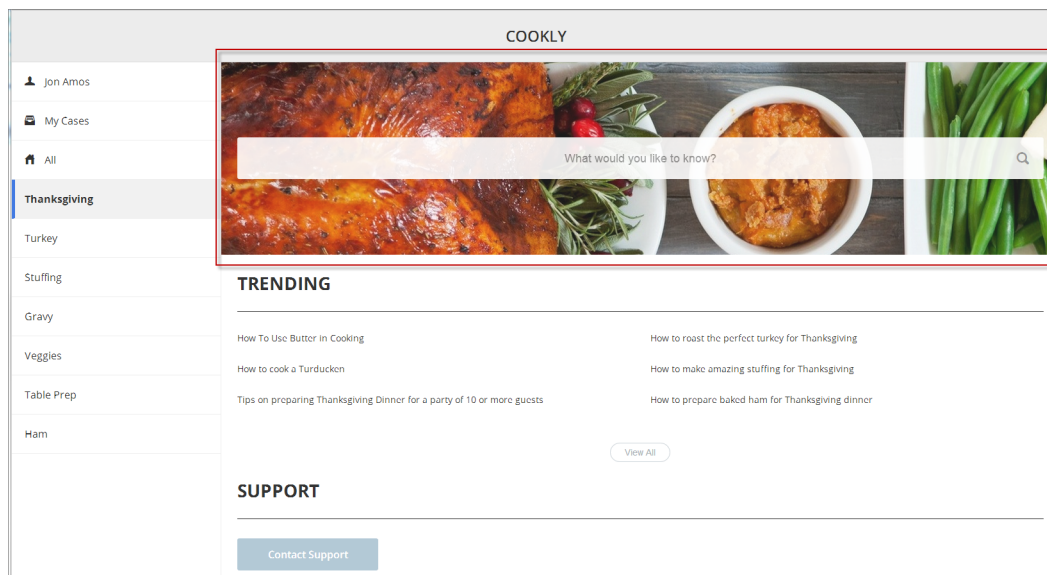
The Featured Search component lets your users search for articles within a specified data category. When a user types in the search text box, the system returns articles and search strings based on matches with the characters being typed. You can customize the search to display an image for the data 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 <code>What would you like to know?</code>
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 <code>{!Global.PathPrefix}/{!DataCategory.Name}.jpg</code> 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.

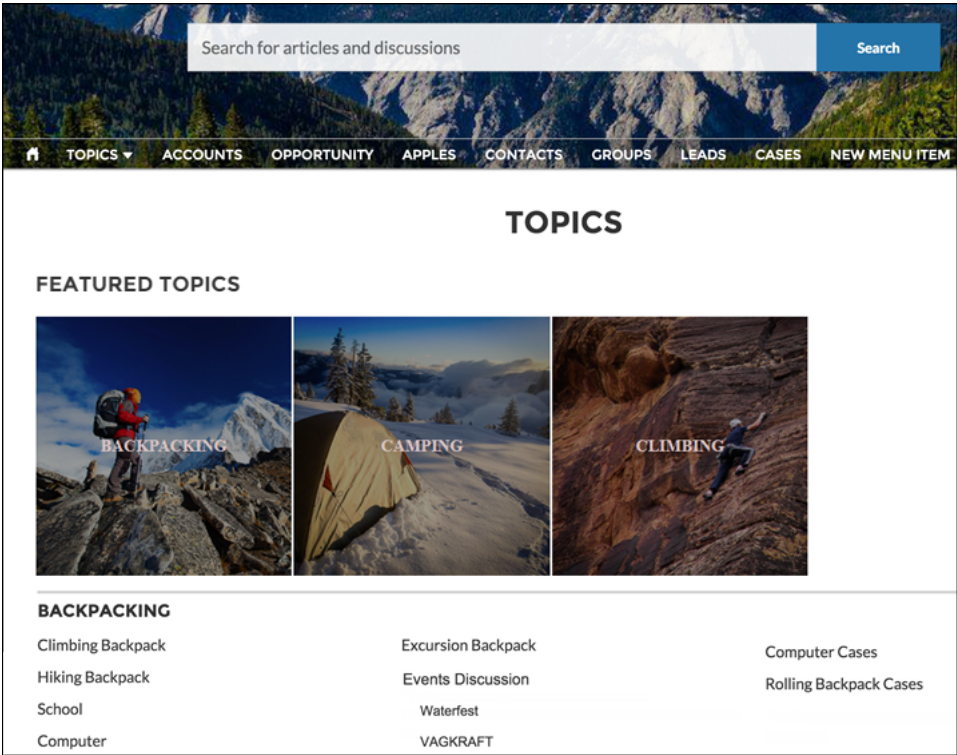
## Featured Topics

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 <code>Featured Topics</code> .
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.

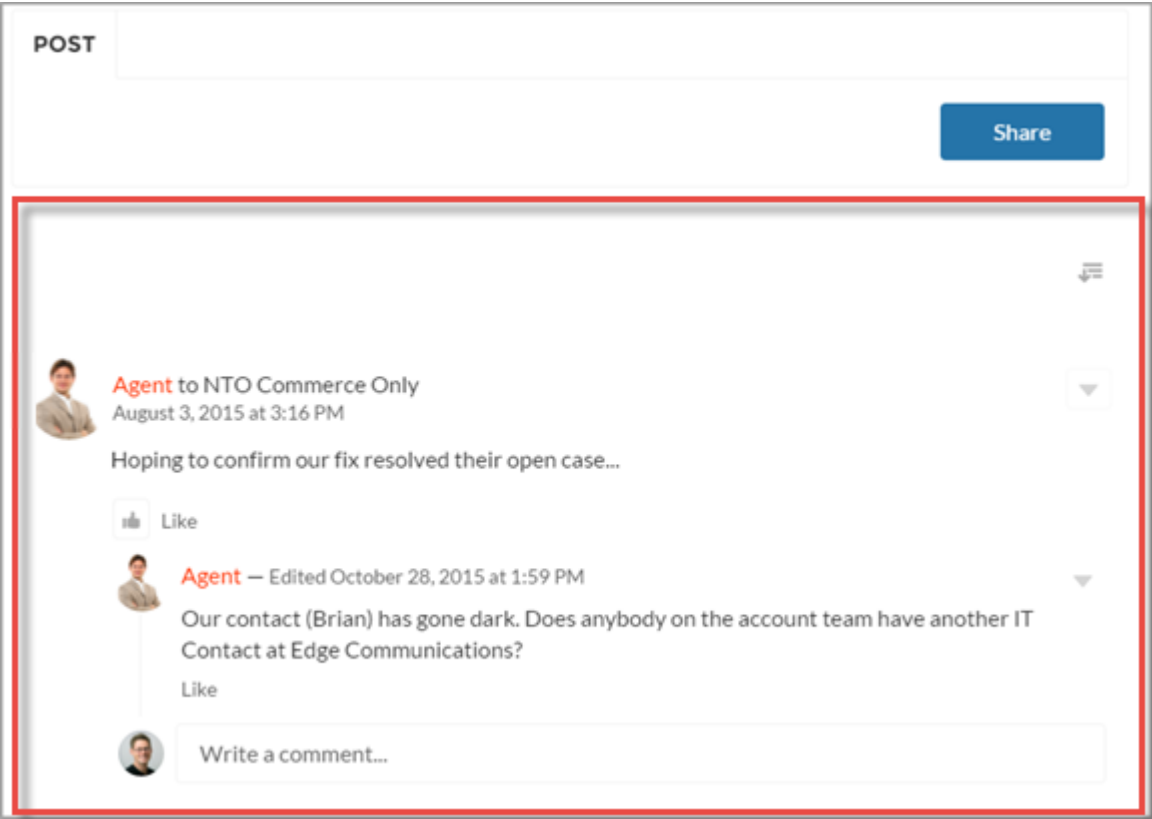
 **Note:** The Feed component isn’t supported for articles.

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 <b>Feed Type</b> .
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.

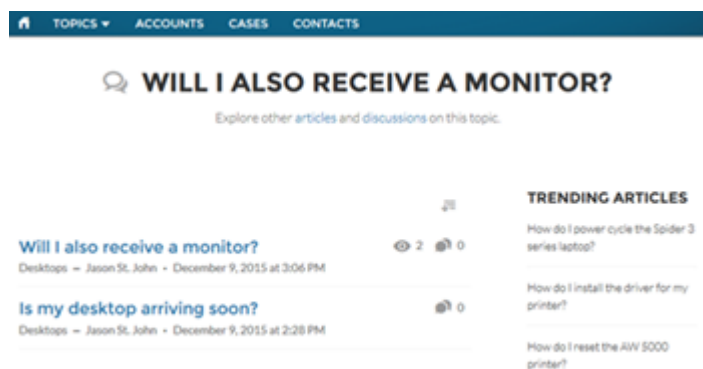
Clicking a post directs users to the expanded post and all its related comments.

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  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.

### Example: Sample Feed Compact component



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.

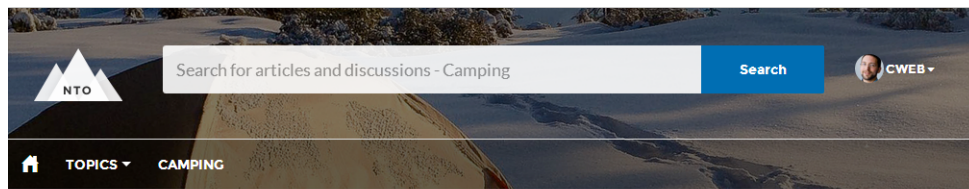
Only users who are logged in can post an answer to a question. Users can attach a file to a question or answer post by clicking the paperclip icon. They can choose to **Select a File** from files already uploaded to the community or **Upload a File** from the user's local drive.

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 Kookia 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.

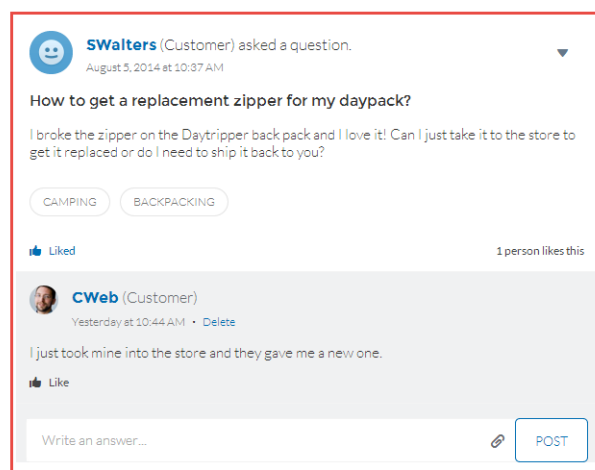
There are no properties to set for this component.

 **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

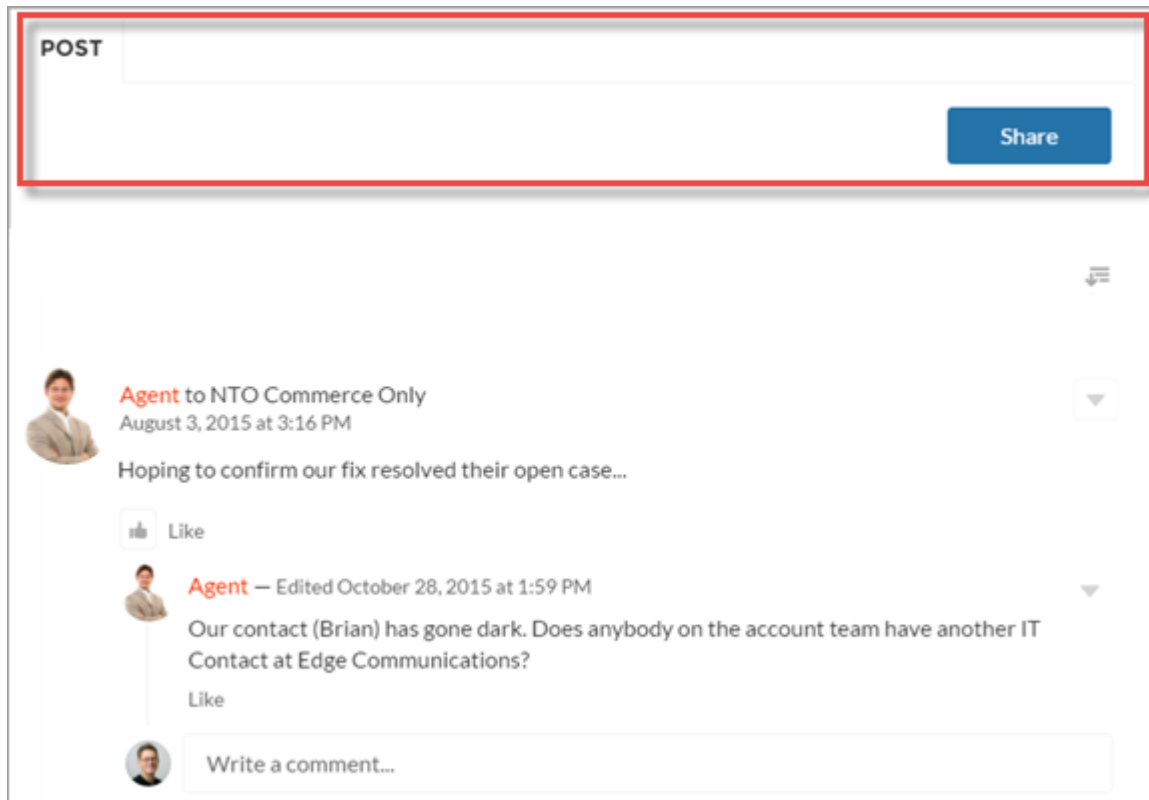
The Feed Publisher component lets customers create rich text posts on records, groups, topics, and profiles, and attach files from any of their devices. It also supports multiple file attachments, inline images, and rich link previews. The Feed Publisher component isn't supported for articles.

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
Type	<p>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.</p> <p>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.</p>
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


**POST**

To [All with access](#) ▼

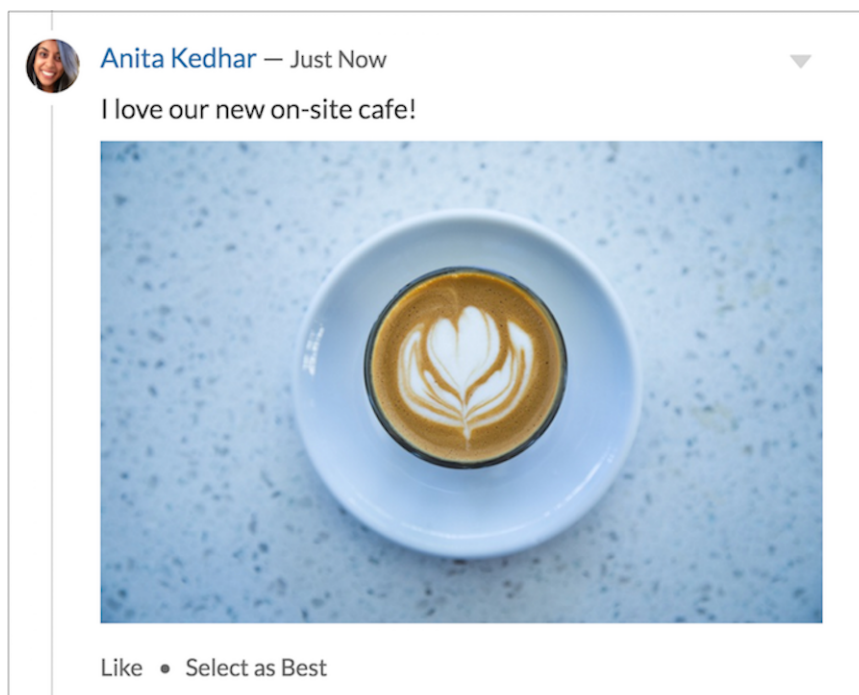
This case is really important. We should be be all-hands on deck for it.

**B I U**    

  [Share](#)



**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:

Property	Details
Files 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

FILES

Owned by Me

86 items • Sorted by Title

Upload File

Owned by Me	TITLE ↑	OWNER	LAST MODIFIED DATE
Shared with Me	 arabica cofee-3	Eric Ware	6/8/2016 10:14 PM
Recent	 AS5000 Ultrabook specification Box 	Eric Ware	6/8/2016 10:14 PM
Following	 Backpack Design -- Kasey Final OneDrive 	Eric Ware	6/8/2016 10:14 PM
Libraries	 badcase of leaf rust	Eric Ware	6/8/2016 10:14 PM
EXTERNAL SOURCES	 button-centering	Eric Ware	6/8/2016 10:14 PM
 Box	 cafe-el-sal	Eric Ware	6/8/2016 10:14 PM
 Google Drive	 cake	Eric Ware	6/8/2016 10:14 PM
 OneDrive	 Capricorn and Fair Trade International SharePoint Online 	Eric Ware	6/8/2016 10:14 PM

## 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 Box

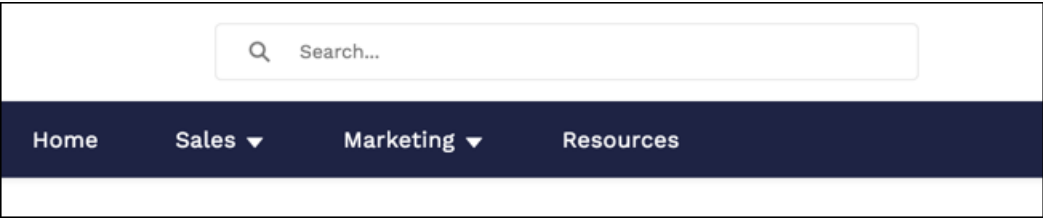
The Global Search component lets you expose global search in your community. Let your users search for any object available to them. Autocomplete search results are based on the most recently used objects and records by the user, same as global search in your org. The search accounts for partially matching terms and non-adjacent terms.

1. Select the **Global Search Box** component in the page you're configuring.  
In the Partner Central template, for example, this box is on the Home page.
2. In the property editor, configure properties for the component:

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



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



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:

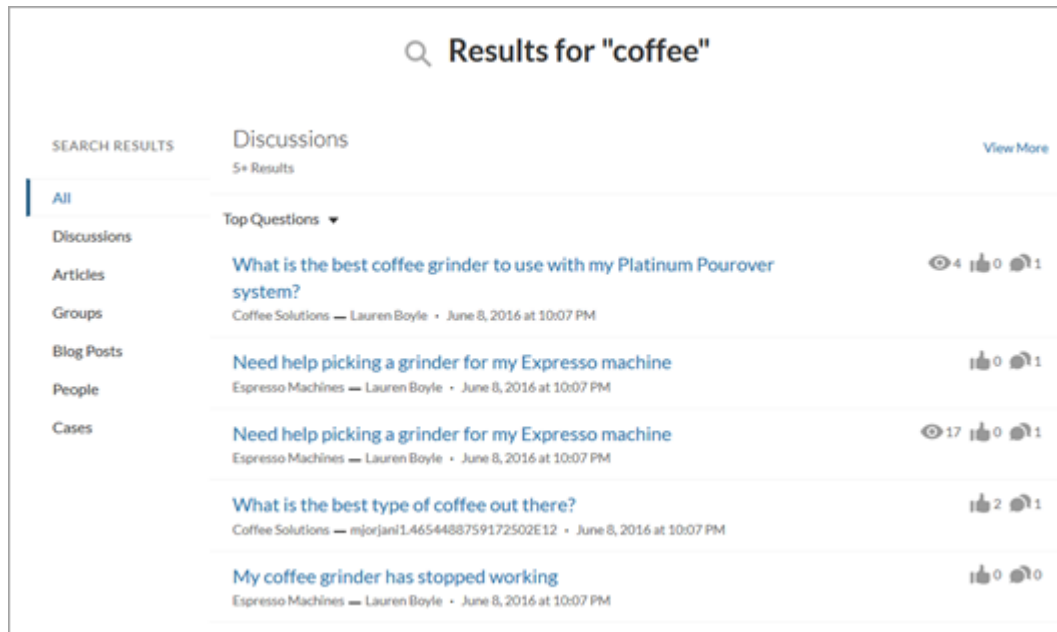
Property	Details
<code>{!searchString}</code>	The system supplies this search term to search across the community.
Show the All results tab	Check the box to show search results in one list under All.
Search Results Tabs	Add or remove tabs to customize which lists search results are displayed in.

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

 **Example:**

 **Note:** To see results from all feed types in a community (including questions and posts on records), select the **Show search results from all feeds, including questions, posts, and comments** option on the Discussions tab.

Global Search Results shown in the community:



SEE ALSO:

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

## Group

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

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

### Note:

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

1. Select the **Group** component on the page you're configuring. By default, this component is located on the Group Detail page.

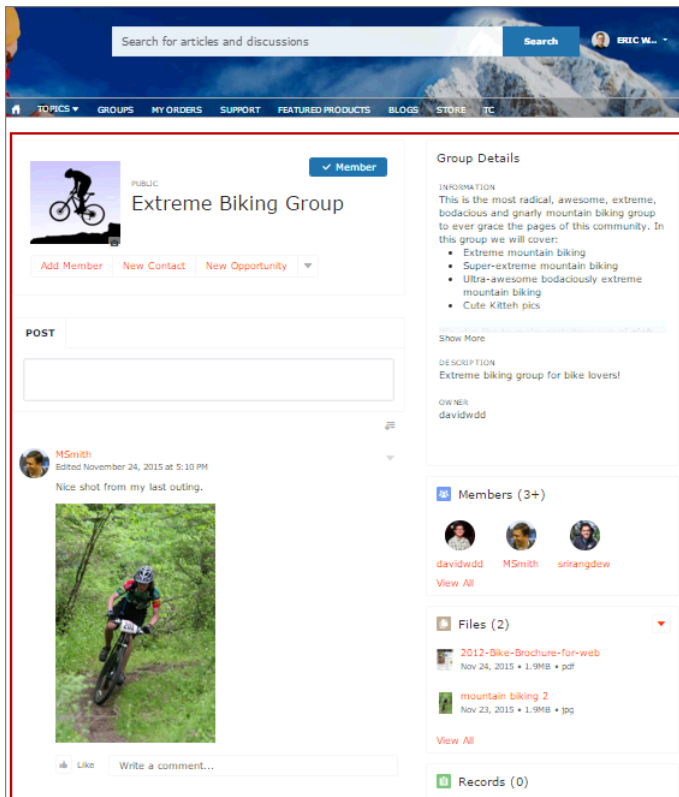
 **Note:** You must have at least one group in your community to view the Group Detail page and modify its components.


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

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 <code>Feed</code> . 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.

Property	Details
Related Tab Label	The label used for the related lists tab on mobile devices. The default text is <code>Related</code> . The label you specify here doesn't affect labels on desktop browsers.

 **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.

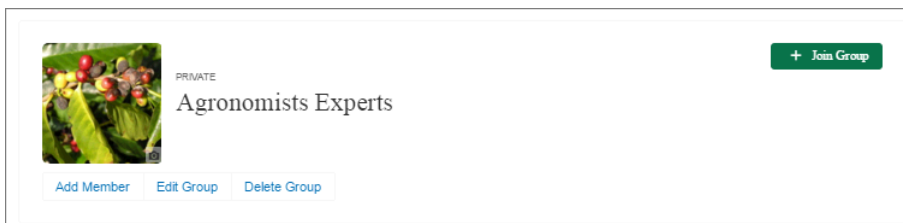
 **Note:**

- 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.

 **Example: 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**

Group Details

INFORMATION

DESCRIPTION

This group is for anyone selling, installing, or troubleshooting the Spider series laptops.

OWNER

Allison Wheeler

SEE ALSO:

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

Group Related List

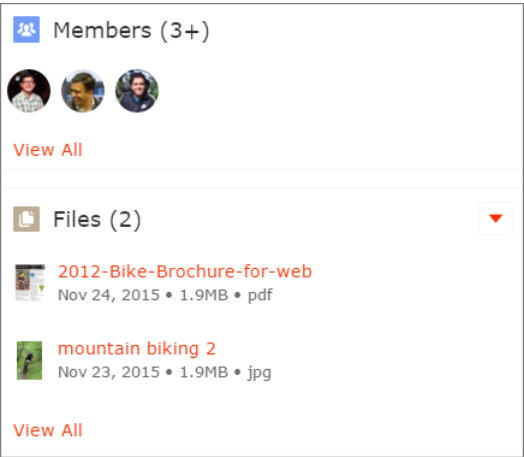
Use the Group Related List component on custom group detail pages for your community. This component displays the group files, members, and records.

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:

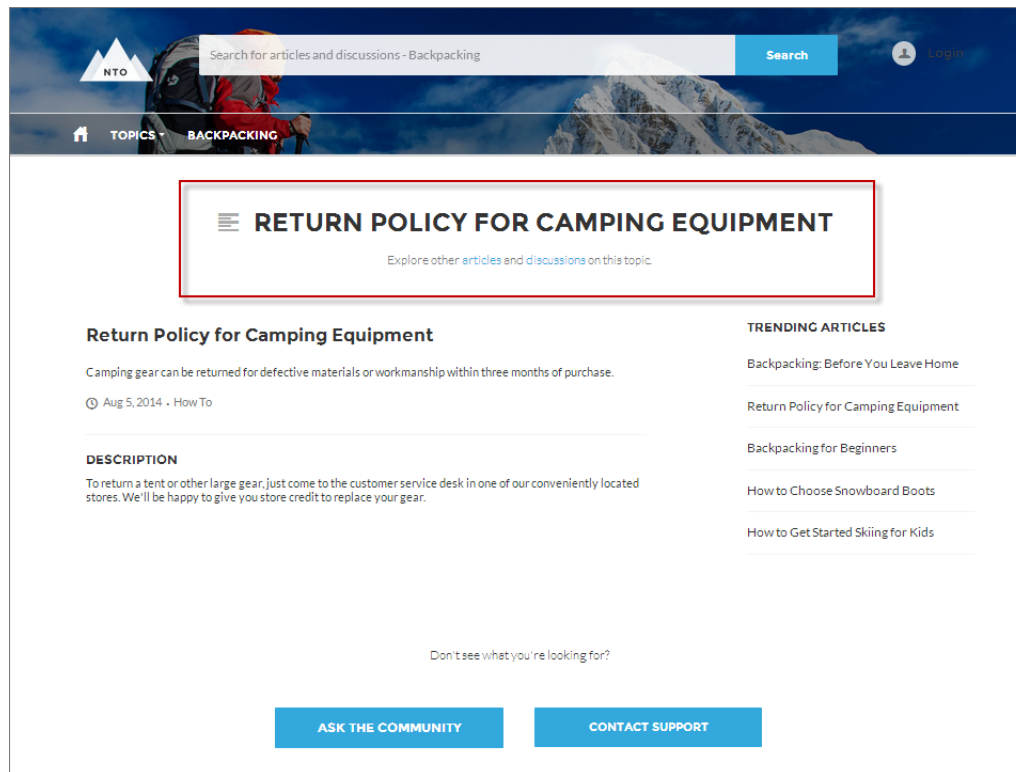
Property	Details
Title	Enter the static text for the page’s headline. The default text for the page is <code>Welcome!</code> .
Banner Text	Enter the static text that appears on the home page. The default text is <code>A place where you can easily find solutions and ask questions.</code>
Page Type	Enter 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. <div>Explore other <code>&lt;a href="javascript:void(0)" class="headlineArticles"&gt;articles&lt;/a&gt;</code> and <code>&lt;a href="javascript:void(0)" class="headlineDiscussions"&gt;discussions&lt;/a&gt;</code> on this topic</div>
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

Property	Details
	<p>organization. You can translate and change the value of each component, but not the position of the component.</p> <pre>Explore other &lt;a href="javascript:void(0)" class="headlineDiscussions"&gt;discussions&lt;/a&gt; on this topic</pre>
Show Subtopics	<p>Below the headline, displays links to topics that are children of the current topic. (On mobile devices, these links appear in a Subtopics menu.)</p> <p>Only navigational topics support parent-child relationships.</p>

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 <code>{!topicName}</code> to retrieve and display the topic name on the topic detail page.
Page Type	Enter <code>topic</code> 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?](#)

## HTML Editor

The HTML Editor component lets you create and edit custom content in HTML.

1. In Community Builder, drag the HTML Editor component from the Components panel onto the page.

### EDITIONS

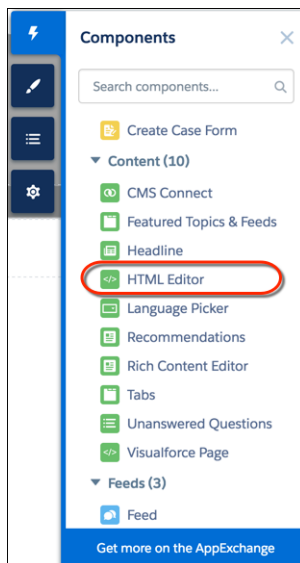
Available in: Salesforce Classic and Lightning Experience

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

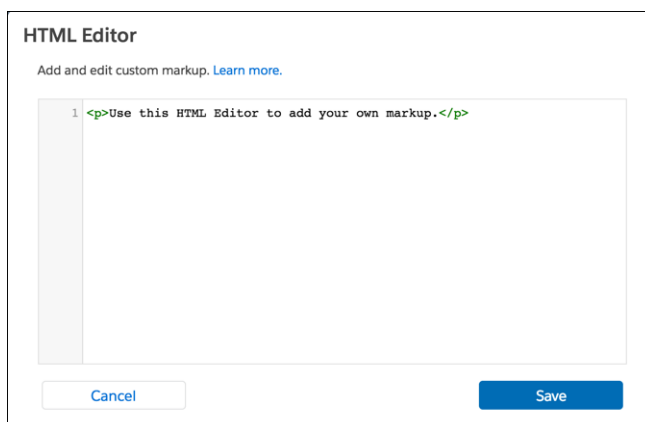
### USER PERMISSIONS

To customize or publish a community:

- Create and Set Up Communities



## 2. Add and format HTML content.



The HTML Editor component supports the following HTML tags and attributes. Any exceptions are flagged in your markup.

Tags: a, abbr, acronym, address, area, b, basefont, bdo, big, blockquote, br, button, caption, center, cite, code, col, colgroup, dd, del, dfn, dir, div, dl, dt, em, fieldset, font, form, h1, h2, h3, h4, h5, h6, hr, i, iframe, img, input, ins, kbd, label, legend, li, map, menu, ol, optgroup, option, p, pre, q, s, samp, select, small, span, strike, strong, sub, sup, table, tbody, td, textarea, tfoot, th, thead, tr, tt, u, ul, var, xmp

Attributes: abbr, accept, accept-charset, accesskey, action, align, alink, allowfullscreen, alt, autocomplete, axis, background, bgcolor, border, cellpadding, cellspacing, char, charoff, charset, checked, cite, class, classid, clear, code, codebase, codetype, color, cols, colspan, compact, content, coords, data, datetime, declare, default, defer, dir, disabled, download, enctype, face, for, frameborder, frameborder, headers, height, href, hreflang, hspace, http-equiv, id, ismap, label, lang, language, link, list, loop, longdesc, low, marginheight, marginwidth, max, maxlength, media, method, min, mozallowfullscreen, multiple, name, nohref, noresize, noshade, novalidate, nowrap, open, optimum, pattern, placeholder, poster, preload, pubdate, radiogroup, readonly, rel, required, rev, reversed, rows,

rowspan, rules, scheme, scope, scrolling, selected, shape, size, span, spellcheck, src, srclang, standby, start, step, style, summary, tabindex, target, text, title, type, usemap, valign, value, valuetype, version, vlink, vspace, webkitAllowFullScreen, width, xmlns, data-\*

SEE ALSO:

[Rich Content Editor](#)

## 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.

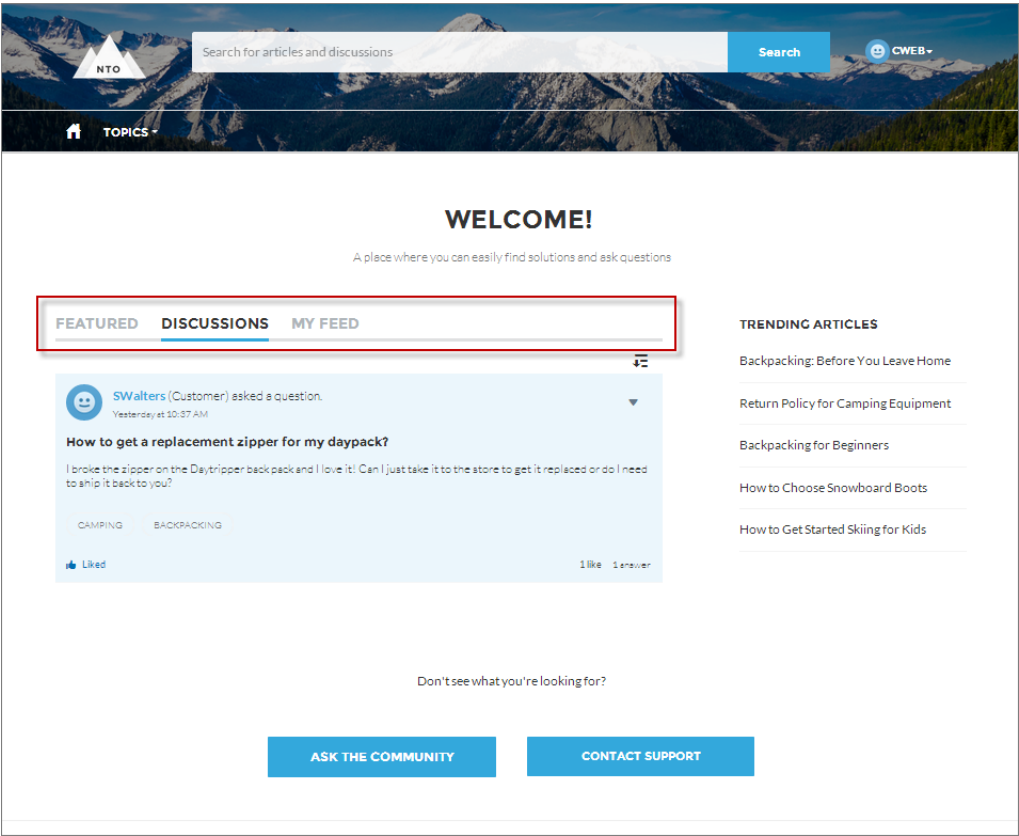


**Note:** Before Summer '16, this component was named Home Page Tabs.

1. Select the **Featured Topics & Feeds** component in the page you're configuring or drag the component from the Components panel to the page to add it.
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 <b>Featured</b> .
Discussion Tab Label	Enter the text you'd like to display on the tab that users select to show discussions. The default text is <b>Discussions</b> .
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 <b>My Feed</b> .
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

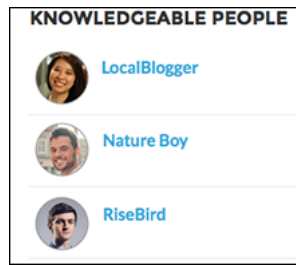
Highlight topic experts so the community can direct questions straight to them. The Knowledgeable People component displays up to five experts, chosen based on factors such as best answers, mentions, or likes on questions and posts.

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.

 **Example:**



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

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

SEE ALSO:

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

## Language Picker

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

You can add the language picker to the header or footer, or to any section of any page; it's not included on any pages by default. Only guest users see the language picker. For authenticated users, the community automatically displays in their profile language. For guest users, the community displays in the community default language. Customized labels and knowledge articles use the translations added by the community admin in Translation Workbench.

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

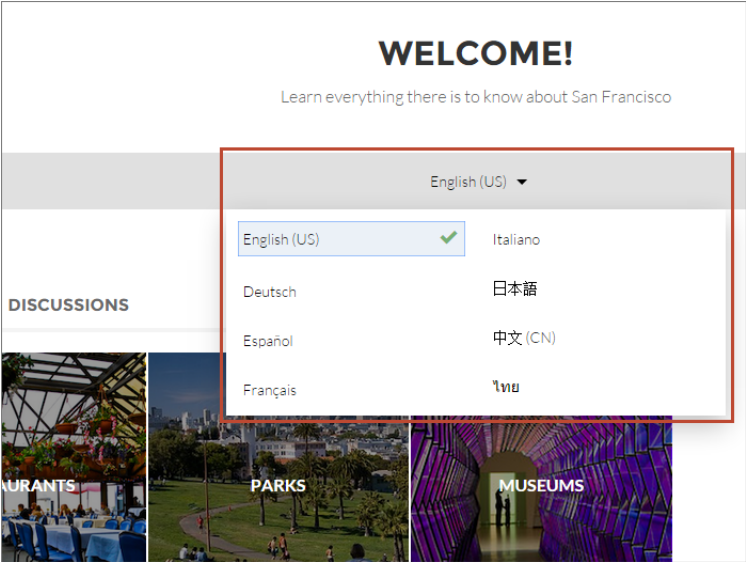
 **Note:**

- The Language pane in Site.com Studio shows the default language and the list of languages supported in the community. If no languages apart from the default language have been set in Site.com Studio, the language picker shows the default language without a drop-down option. To learn more about setting site languages in Site.com Studio, see [Create a Multilingual Site](#).
- To see the list of languages that guest users see, go to the Branding Editor in Community Builder. Make sure you're on a page that contains the language picker. Then click the drop-down icon on the language picker.

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

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

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



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

## Lead Inbox

Use the Lead Inbox component to share a common pool of leads with partners in your community.

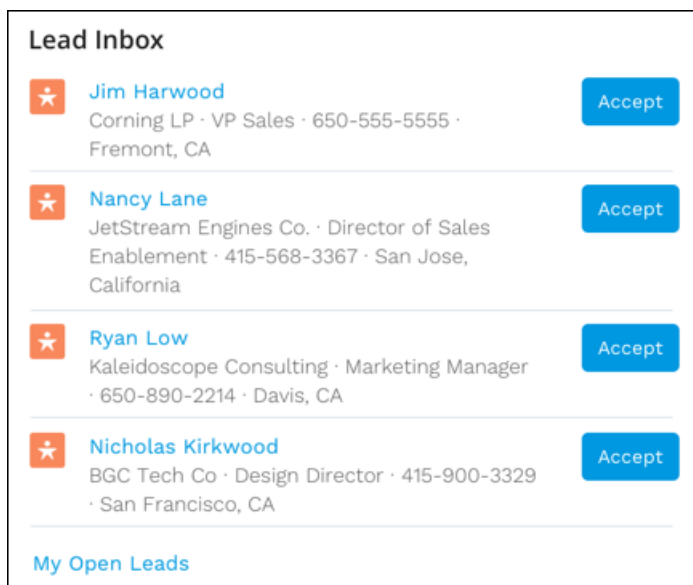
The lead inbox uses a queue and the list view associated with a queue to pass leads to partners. You can select the default list view (associated with the queue) to show in the inbox. Partners included in the visibility settings for the queue and list view can see and accept leads from the Lead Inbox. Accepting a lead makes the user the owner of the lead.

1. Click the Lead Inbox component on the page you’re configuring. By default, the Lead Inbox component lives on the Home page of the Partner Central template.
2. In the property editor, configure properties for the component:

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

Property	Details
Link to the leads list view	Select to show a link to a lead list view on the lead inbox.
Linked List View	If you selected the previous option, specify the leads list view you'd like to show a link for. By default, the first leads list view in the org is selected.

 **Example:** Sample Lead Inbox Component



SEE ALSO:

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

## Message Notification

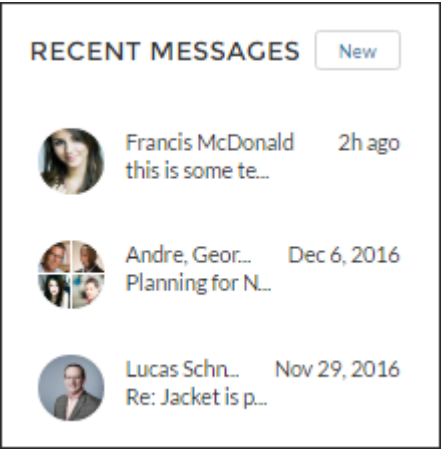
Add the Message Notification component to your community pages to let users view their recent messages from outside the Messages list view. The Message Notification component shows up to three recent messages and allows users to send new messages.

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 <i>Recent Messages</i> .

 **Example:** Sample Message Notification component:



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

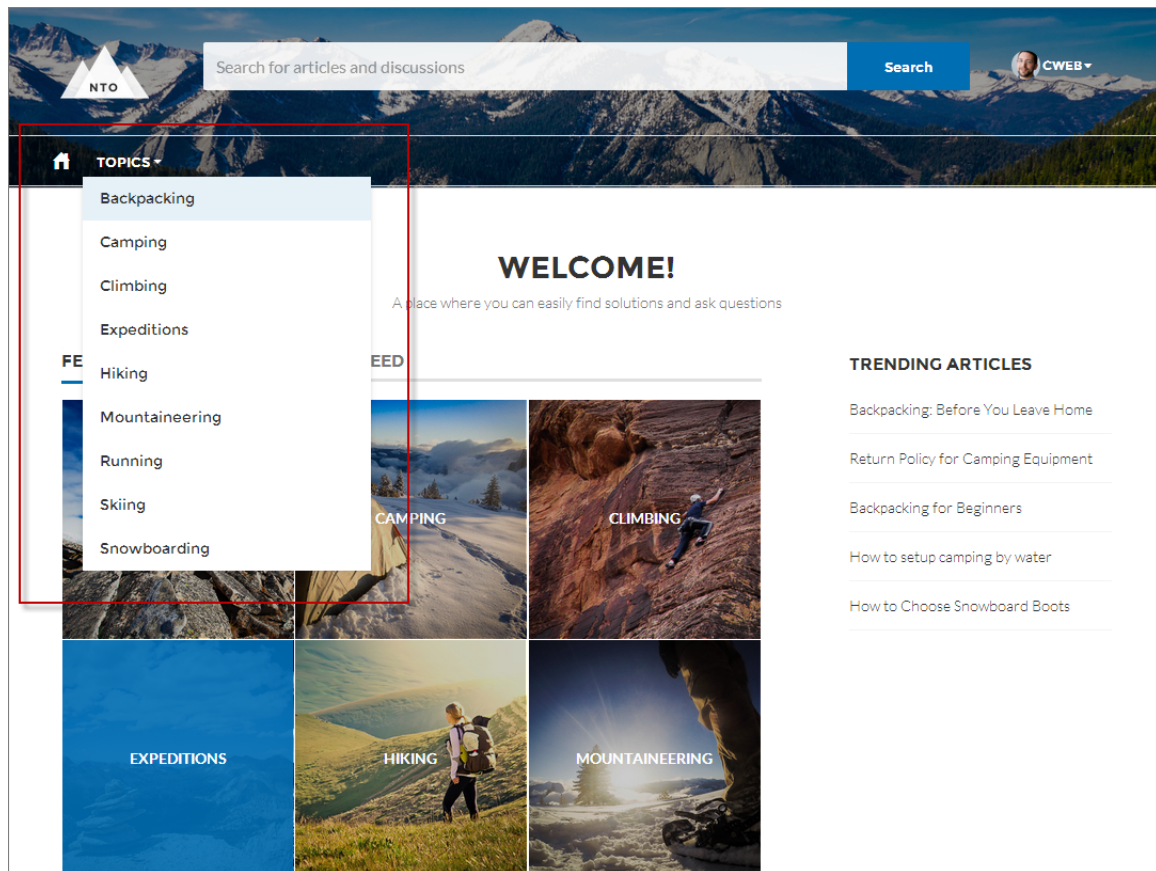
## Navigation Bar

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.

 **Example:** Sample Navigation Bar component:



SEE ALSO:

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

## Navigation Menu

The navigation menu component extends your community's navigation beyond navigational topics. Navigation menu items can include Salesforce objects, topics, pages in your community, URLs to external sites, and menu labels. Menu labels are parent headings under which you can nest other menu items. You can also enable the App Launcher to make it easy for members to switch between their communities and their Salesforce org.




When setting up the navigation menu, consider the following:


- 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.

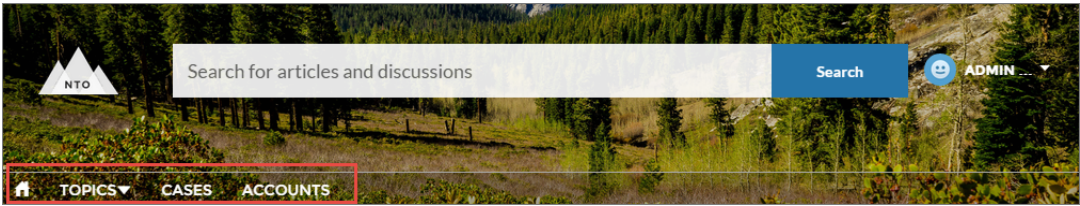
To create or modify navigation menu items:

1. Select the **Navigation Menu** component in the page you're configuring.
2. To display the App Launcher in existing communities, deselect **Hide App Launcher in community header**.

3. To show an icon for Home instead of text, select `Replace Home text with icon`.
4. In the property editor, click **Navigation Menu**.  
In the menu editor overlay, you can edit or delete existing menu items, or add new ones.
5. To add a menu item:
  - a. Click **Add Menu Item**.
  - b. Enter the name you want to use in the navigation menu for this item.
  - c. Select the type of item you're navigating to.  
Options include:
    - Community Page—Links to a page inside your community using a relative URL. For example, `/contactsupport`.
    - External URL—Links to a URL outside of your community. For example, `http://www.salesforce.com`.
    - Menu Label—Adds a parent heading for your navigation menu. Nest items underneath the menu label.
    - Navigational Topic—A drop-down with links to the navigational topics in your community. Navigational topics are set up in Community Management.
    - Salesforce Object—Available objects include accounts, cases, contacts, leads, opportunities, and any custom objects.

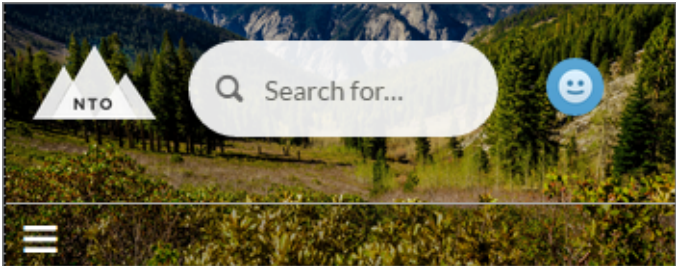
 **Tip:** Select this option to create a list view page for the selected object. This option is the easiest way to expose Salesforce record data in your community with minimum configuration.
  - d. Complete the fields based on the type you selected.
    - If you selected Salesforce Object, select the default list view to show.
    - If you selected Community Page, use the drop-down to select the community page you want to link to. The URL field automatically populates the relative URL for the page based on your selection.
    - If you selected External URL, enter the fully qualified URL. To keep navigation within your community, select the `Open link in the same tab` checkbox.
    - Select **Publicly Available** if you want the navigation menu item to show for guest users that aren't members of the community.
6. To move an item, click  and drag the item to where you want it to appear in the menu. Nest other menu items underneath a menu label by dragging them to the right under the menu label.
7. To delete a menu item, hover over or click the item and click .
8. Save your changes.  
If your community is already active, you see a Publish Changes button. **When you click this button, your new navigation menu changes are immediately visible to community members.**  
If your community is still in Preview status, you see a Save Changes button. When you click this button, your changes are saved and are visible to your community when you activate it.

 **Example:** Sample Navigation Menu component:



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

Sample Navigation Menu component on a mobile device:



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

SEE ALSO:

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

## New Message Button

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

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

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

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 <i>Send Message</i> .

 **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 a [sales process in your org](#).
2. Set up the path in the Setup menu.
  - a. From Setup, enter **Path** in the Quick Find box, then select **Path Settings**.
  - b. Click **Enable**, and then click **New Path** to create a path.
3. [Create object pages](#) in Community Builder (for the opportunity or lead objects).
4. Drag the **Path** component onto the Opportunity Detail or Lead Detail page you're configuring.



**Example:** Sample Sales Path component:

The screenshot shows the Salesforce Path component on an Opportunity record page for 'Big Sky & Sons - Add-On Business - 20K'. The path consists of four stages: 'Proposal/Quote' (active), 'Negotiation', 'Closed', and 'Mark Stage as Complete'. Below the path, there are two sections: 'KEY FIELDS' and 'GUIDANCE FOR SUCCESS'. The 'KEY FIELDS' section includes a checkbox for 'Complete ROI Analysis' and a text field for 'Next Step' with the value 'Need to get their decision maker in a room with our exec by end of week to close this one'. The 'GUIDANCE FOR SUCCESS' section contains a list of bullet points: 'Where are they in the buying cycle?', 'What's the process to generate purchase orders?', 'Who are the key decision makers? Have you added them to the opportunity?', 'How can you communicate the value of our solutions to those decision makers?', and 'What's the status of quantifying ROI with them?'.


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.

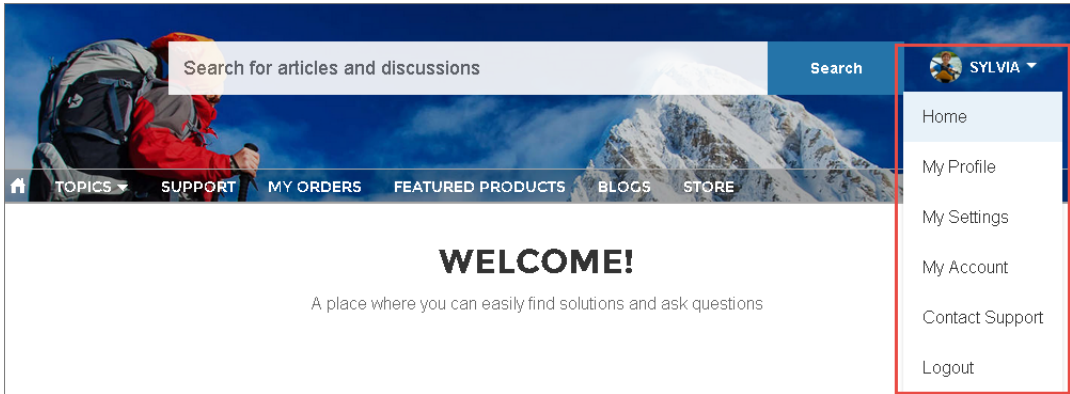
Users can't customize the profile photo functionality in the profile header—they need to edit all profile information from the profile details page.

-  **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	<p>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.</p> <p> <b>Note:</b> 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.</p>
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 <i>View Profile</i> .
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 <i>Login</i> .
Logout Label	Enter the text you want to show for the link to log out from the community. The default text is <i>Log Out</i> .
Community Management	Enter the text you want to show for the link to the Community Management page. The default text is <i>.</i> 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 <i>My Settings</i> .
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)	<p>Enter the text you want to show for the link that external users click to view their account record. The Default text is <i>My Account</i>. This feature is available in the Spring '16 version of the Customer Service (Napili) template and later.</p> <p> <b>Note:</b> External community members who access the My Account link see their account details based on the configuration of the Record Detail page.</p>

 **Example:** Sample Profile Header component:



SEE ALSO:

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

## Recommendations

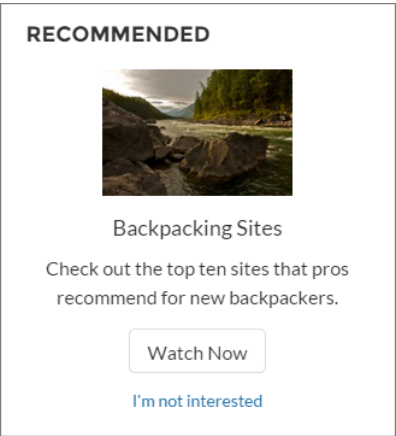
The Recommendations component displays the recommendations for your community.

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 <i>Recommended</i> .
Recommendation Channel	Choose the recommendation channel. The default is <i>Default Channel</i> . 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 Tabs 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 Pages menu in Community Builder, select Record Detail or your custom record detail page.
2. Select the **Record Banner** component or drag the component from the Components panel to the page to add it.
3. In the property editor, configure properties for the component:

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.

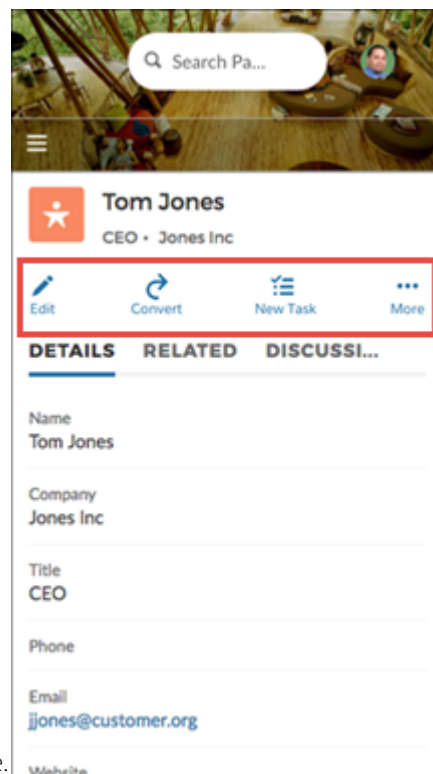
 **Note:** To display the record feed, use one the feed components with the feed publisher component. To show the related records, use the [Record Related List](#) component. To show a combination of record details, related lists, and the record feed together, we recommend using the composite [Record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

Account Owner Scott Clark	<a href="#">Change Account O...</a>	Phone (905) 555-1212
Account Name Global Media		Fax
Parent Account		Website
<b>ADDITIONAL INFORMATION</b>		
Type Prospect		Employees 14,668
Industry Media		Annual Revenue



Example of actions on a mobile device.

## Record Information Tabs

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

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

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

- You can use the Record Information Tabs component on custom record detail pages that you create. We recommend using it with the Record Banner component.
- You can modify what fields display in the Record Information Tabs component by customizing the object's page layout.
- Community members with permissions can create new related records and send emails from the Related tab. They can also expand related record lists to see a longer list. These details are displayed on the generic Record Related List page.

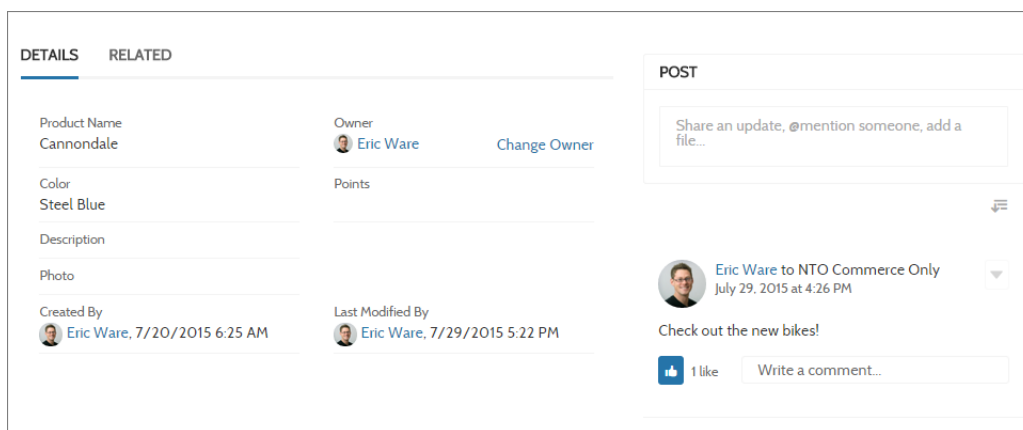
 **Note:** Emails are supported in accounts, contacts, leads, opportunities, and campaigns.

1. From the Pages menu in Community Builder, select Record Detail or your custom record detail page.
2. Select the **Record Information Tabs** component or drag the component from the Components panel to the page to add it.
3. In the property editor, configure properties for the component:

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:

Property	Details
Number of Records	<p>The number of entries retrieved to show in the list view. The default is 25.</p> <p>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.</p> <p>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.</p>
Layout	<p>Choose from full layout or compact layout. When choosing the layout, consider the following:</p> <ul style="list-style-type: none"> <li>• Compact layout works in any size column. For full layout, use a column width of at least 50% of the page.</li> <li>• If using the full layout, we recommend that you don't place a component below the Record List component on the page. <ul style="list-style-type: none"> <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> </li> </ul>

Property	Details
	<ul style="list-style-type: none"> <li>Full layout uses infinite scrolling. If you reference an object that contains many records, infinite scrolling can prevent community members from ever seeing the component below the Record List component.</li> </ul>
Page's Object Name	The Salesforce object whose records you want to show. The drop-down shows the supported objects: accounts, campaigns, campaign members, cases, contacts, groups, leads, opportunities, and custom objects.
Page's Filter Name	The list view to show for the selected object. The drop-down shows only list views that are valid for the object you select.



**Example:** Sample Record List component (Full layout):

<div> <div>CASES</div> <div>My Open Cases ▾ 1</div> <div>6 Items • Sorted by Case Number • Filtered by Closed • Last updated 11/30/2015 at 08:44:58</div> </div>						
CASE NUMBER	CONTACT NAME	SUBJECT	STATUS	PRIORITY	DATE/TIME OPENED	CASE OWNER ALIAS
00001029	Lauren Boyle	issue	New	Medium	10/2/2015 4:33 PM	msmit
00001030	Lauren Boyle	test	New	Medium	10/2/2015 4:33 PM	msmit
00001031	Lauren Boyle	test2	New	Medium	10/2/2015 4:34 PM	msmit
00001032	[C] Communities ...	Test email attach...	New	Medium	11/10/2015 10:25 AM	msmit

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):

<b>MY CASES</b>
<div>issue</div> <div>Medium • New • 00001029</div>
<div>test</div> <div>Medium • New • 00001030</div>
<div>test2</div> <div>Medium • New • 00001031</div>
<div>Test email attachment</div> <div>Medium • New • 00001032</div>
<div>Medium • New • 00001033</div>
<div>Medium • New • 00001034</div>
<a href="#">View All</a>

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:

ACCOUNTS > EDGE COMMUNICATIONS			
<b>Contacts</b>			
8 Items • Sorted by Last Name			
New			
CONTACT NAME	TITLE	EMAIL	PHONE
Michael Chang		michaelcalf@gmail.com	
Sean Forbes	CFO	sean@edge.com	(512) 757-6000
Rose Gonzalez	SVP, Procurement	rose@edge.com	(512) 757-6000

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 <code>Related Articles</code> .
Show Views	Select to show the number of times an article is viewed  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 <code>Related Questions</code> .
Show Views	Select to show the number of times a question is viewed, liked, or commented on,  2. Clear to hide the view count.

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

**RELATED QUESTIONS**

What's the sequence to enable Launch Control?

18

What's the code for a tire pressure sensor issue?

16

What kind of mileage does an E92/E90 V8 get on the highway?

11

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

## Related Topics List


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

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

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

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

Property	Details
Title	Enter a title for the list of related topics. The default text is <code>Related Topics List</code> .
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:

**RELATED TOPICS**

CAMPING

BACKPACKING

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

## Report Chart

Use the Report Chart component to drag and drop reports you set up in your Salesforce org's public folder to your community's pages. When you click a report, you see the Report Detail page, which shows the Report Summary component. The report summary includes details from the source report in Salesforce.



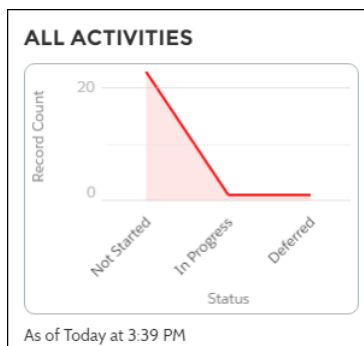
**Note:** Only reports with a chart populate in the drop-down list in the report's properties.

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

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 <code>Leaderboard</code> .
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	<ul style="list-style-type: none"> <li>• If the logged-in user doesn't rank on the leaderboard, a row for the user appears at the bottom of the leaderboard.</li> <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 <code>Earn points and climb to new levels when you contribute in the community!</code>
Display Users':	Determines what information about a user shows in the leaderboard. Options include: <ul style="list-style-type: none"> <li>• Levels and Points—Shows a user's reputation level and total number of reputation points.</li> <li>• Knowledge and Points—Shows a user's total number of reputation points and topics that they're knowledgeable about.</li> <li>• Knowledge and Last Active—Shows topics a user is knowledgeable about and when the user was last active.</li> </ul>
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 <code>Knows about</code> . 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

LEADERBOARD 		
1.	 <b>Eric Ware</b>  Squirrel	646 Points
2.	 <b>Sylvia</b>  Salamander	332 Points
3.	 <b>Sether</b>  Salamander	292 Points
4.	 <b>Tahome</b>  Salamander	278 Points
5.	 <b>Patricia</b>  Salamander	224 Points
	 <b>MSmith</b>  Salmon	142 Points

#### Topics and Points

LEADERBOARD	
 <b>Eric Ware</b>	Knows about: <a href="#">Camp &amp; Hike, ...</a> 646 Points
 <b>Sylvia</b>	Knows about: <a href="#">Outdoor Packs,...</a> 332 Points
 <b>Sether</b>	No recent topic activity 292 Points
 <b>Tahome</b>	Knows about: <a href="#">Camp &amp; Hike, ...</a> 278 Points
 <b>Patricia</b>	Knows about: <a href="#">Backpacking P...</a> 224 Points

#### Topics and Last Active

LEADERBOARD	
 <b>Eric Ware</b>	Knows about: <a href="#">Camp &amp; Hike, ...</a> Active 8 hours ago
 <b>Sylvia</b>	Knows about: <a href="#">Outdoor Packs,...</a> Active 30+ days ago
 <b>Sether</b>	No recent topic activity Active 30+ days ago
 <b>Tahome</b>	Knows about: <a href="#">Camp &amp; Hike, ...</a> Active 30+ days ago
 <b>Patricia</b>	Knows about: <a href="#">Backpacking P...</a> Active 30+ days ago

SEE ALSO:

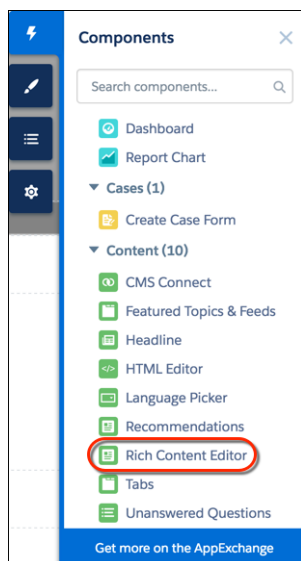
[Which Components Can I Use with Each Template?](#)

## Rich Content Editor

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

If you prefer to create and edit your content in HTML, use the HTML Editor component.

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



### EDITIONS

Available in: Salesforce Classic and Lightning Experience

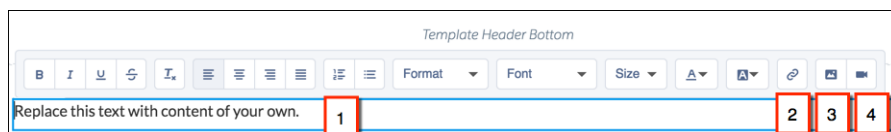
Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions

### USER PERMISSIONS

To customize or publish a community:

- Create and Set Up Communities


2. Add and format text (1), and add links (2), images (3), and YouTube or Vimeo videos (4) directly in the editor.



When you add an image to your community for the first time, an asset file is automatically created and stored in the Org Asset Library.

**Note:** If public access is enabled in Community Builder at the page or community level, the **Let guest users view asset files on public and login pages** preference is enabled in **Administration > Preferences**. This preference remains enabled as long as any page has public access enabled. If you upload images for use on community login pages, be sure that this preference is enabled.

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


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

Add a Video

Bring your community to life with a [YouTube](#) or [Vimeo](#) video.

YouTube or Vimeo URL

Salesforce World Tour New York Highlights in 60 Seconds



Cancel

OK

SEE ALSO:

[Find and Create Asset Files in Community Builder](#)

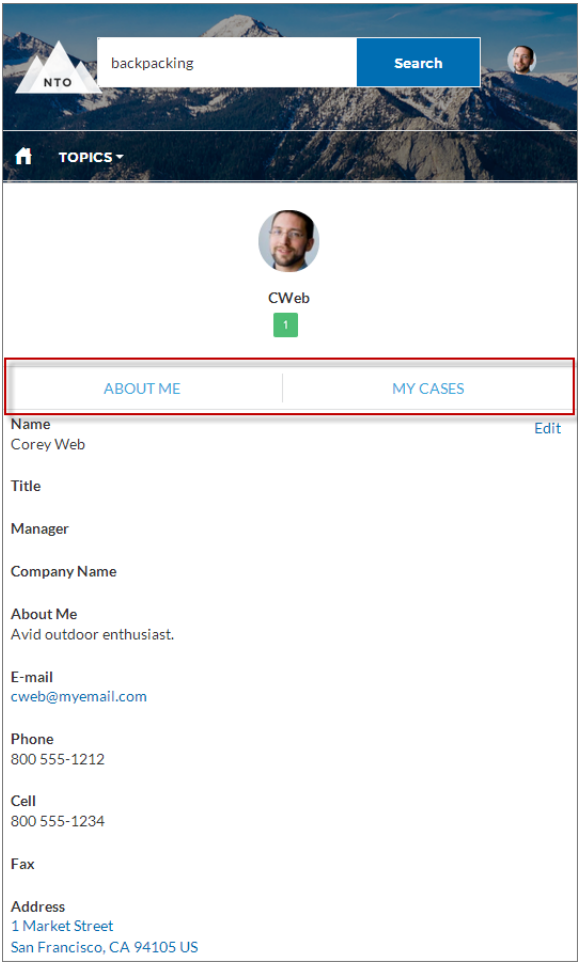
[HTML Editor](#)

## Scroll To

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

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

 **Example:** Sample Scroll To component:



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

## Search

The Search component lets users search articles within the context of the page they’re viewing. When a user types in the search text box, the system returns suggested articles and search strings that match the characters typed in the search box.

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

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

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:

COOKLY



#### How to cook Marinated Wild Salmon

"A delicious, healthy lemon-garlic marinade for salmon with cilantro and red chili flakes. Marinate at least 6 hours. Broil in the oven or grill 7 to 8 minutes per side."

© Apr 4, 2014 · How To

#### ADDITIONAL RESOURCES



#### Directions

1. Season fillets with salt and pepper, onion powder, and red pepper flakes. Set aside in a baking dish.
2. In a medium bowl, mix together olive oil, lemon juice, garlic, balsamic vinegar, sugar, green onions, and cilantro. Pour marinade over salmon; cover, and refrigerate overnight, or at least 6 hours.
3. Preheat oven to 450 degrees F (230 degrees C).
4. Arrange salmon on a broiling sheet. Place in a preheated oven, and bake for 5 minutes. Increase heat to 500 degrees F (260 degrees C), turn fillets, and broil 5 minutes more.

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.

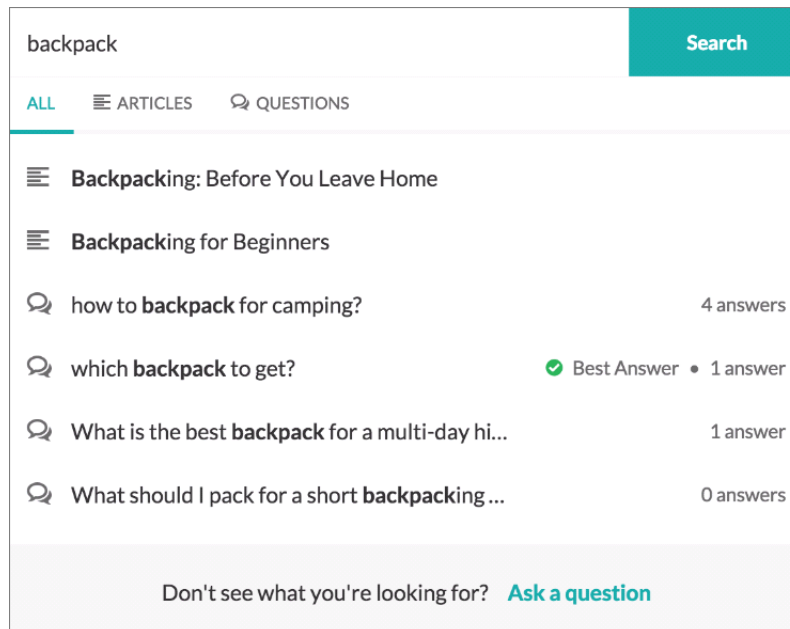
1. Select the **Search & Post Publisher** component in the page you're configuring.

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

Property	Details
<b>Autocomplete Search</b>	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.   <b>Note:</b> 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.
<b>Autocomplete Results: Sort by Relevance</b>	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.
<b>Autocomplete Results: Group by Object</b>	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 <b>All</b> . 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 <b>Articles</b> . 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 <b>Discussions</b> . This functionality is available only in the Winter '16 and later versions of community templates.
<b>Ask Community</b>	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.
<b>Post to Publisher</b>	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.
<b>Contact Support</b>	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.

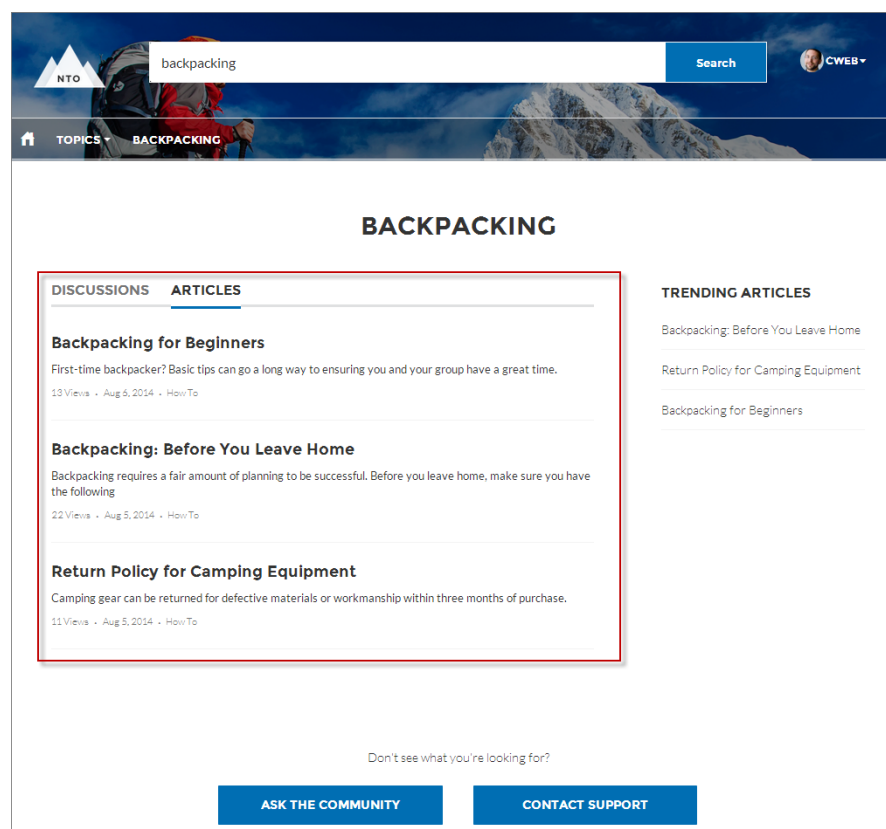
1. Select the **Search Results** component in the page you're configuring.
2. In the property editor, configure properties for the component:

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 <code>Articles</code> .
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 <code>Discussions</code> .
Topic ID	The expression in the <code>Topic ID</code> 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 <i>articles</i> to display the article search results first or <i>discussions</i> 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

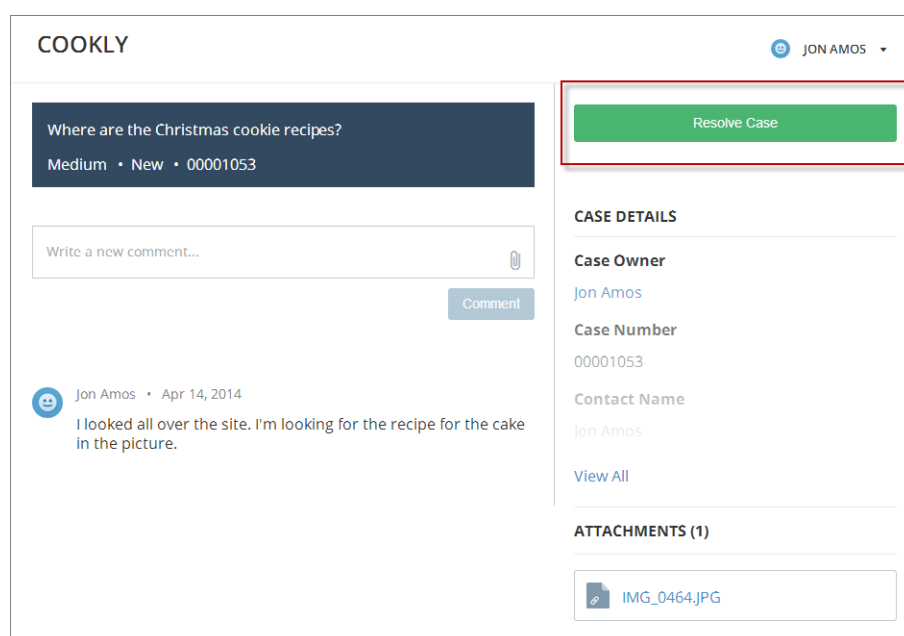
The Set Case Status Button component lets users click a button to mark a case as resolved and close it.

**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?](#)

## Snap-ins Chat

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

### Important:

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

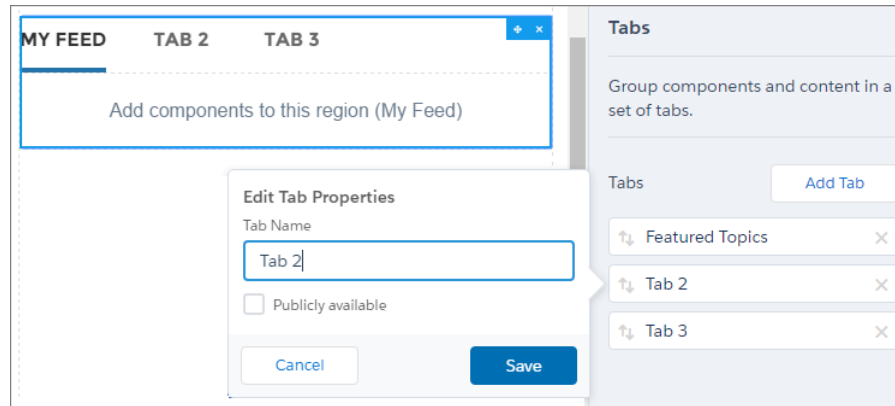
1. Select the Snap-ins Chat component in the page that you're configuring.
2. In the property editor, configure properties for the component:

Property	Details
Chat Deployment	Select a Snap-ins Chat deployment.
Display Chat Button	Display the chat button to users.
Button Label	Enter a label for the chat button. The user sees this before they start a chat. The default label is <i>Chat with an Expert</i> .
Offline Button Label	Enter a label for the chat button when there are no support agents available to chat. The default label is <i>Agent Offline</i> .
Chat Waiting Message	Enter a label for the chat button when a chat has been requested and is waiting for an agent. The default label is <i>Loading.....</i>
Chat Waiting Background Image URL	Enter a URL for an image to display in the chat window when a chat is waiting for an agent.
Agent Avatar Image URL	Enter a URL for an agent avatar image to display in the chat window. This avatar applies to all agents taking chats from this button. We recommend using an image no larger than 40x40 pixels
Pre-Chat Background Image URL	Enter a URL for a banner image to display in the chat window while the user fills out the pre-chat form.
Company Logo URL	Enter a URL for a logo to display in the minimized chat window when a chat is waiting for an agent. We recommend using an image no larger than 25x25 pixels.

## 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.

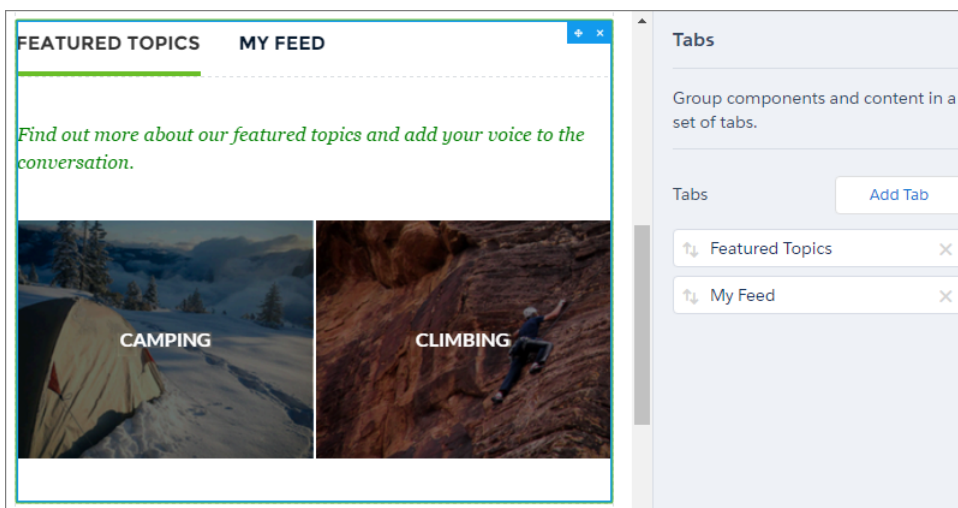
1. Add the **Tabs** component to a page or select it on the page you're configuring.
2. In the property editor, configure the component.
  - To add another tab, click **Add Tab**.
  - To rename a tab or set its public availability, select the tab. To make that tab available to guest users in the community, 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?](#)

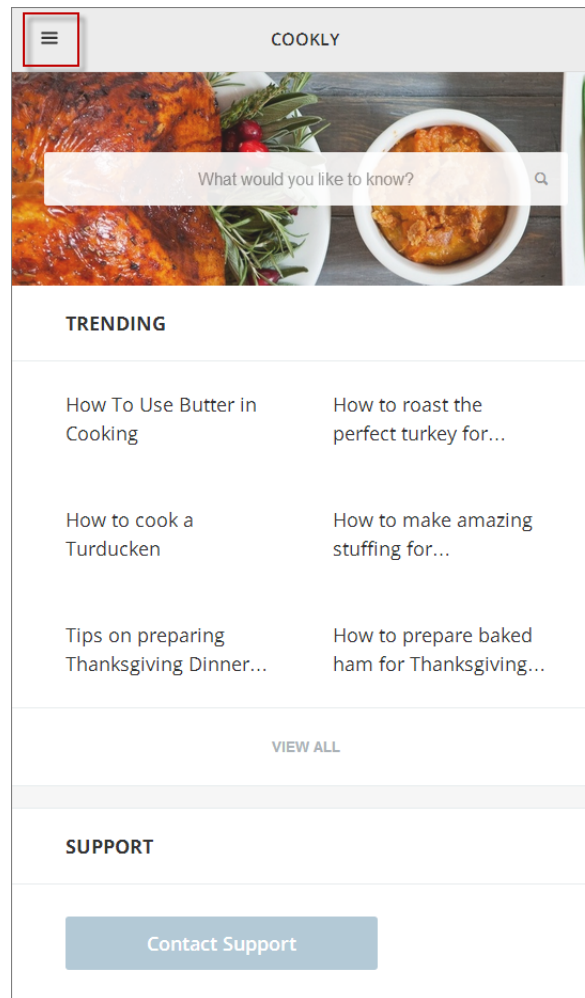
## Toggle Button

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.

1. Select the **Toggle Button** component in the page you're configuring.  
There are no properties to set for this component.

 **Example:** Sample Toggle Button component:




SEE ALSO:

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

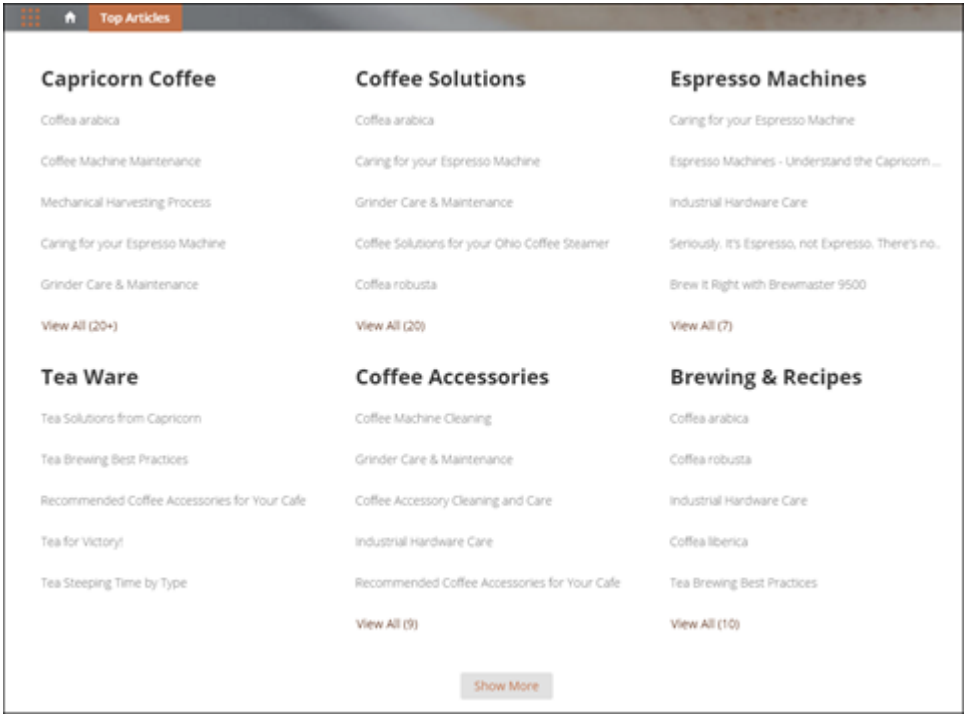
## Top Article by Topic

Give your customers more direction when they're browsing your knowledge articles. Using the Top Articles by Topic component, you can organize topics in one view. Articles populate under the topics, ranked by view count.

1. Select the **Top Articles by Topic** component.
2. In the property editor, configure the component.
  - To add another topic, click **Add**.
  - To set a topic's public availability, select the topic. To make that tab available to guest users in the community, select **Publicly available**.
  - To reorder topics, drag the tile to the correct position.
  - Indicate the number of articles to list under each topic (maximum 10).

 **Note:** If you delete a topic from a community, but have it referenced in the Top Articles by Topic component, the topic name won't show. The articles, however, are listed under a blank topic name. To not see the article list, delete the topic name from the Top Articles by Topic component as well.

 **Example:** Top Articles by Topic component in use:



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.

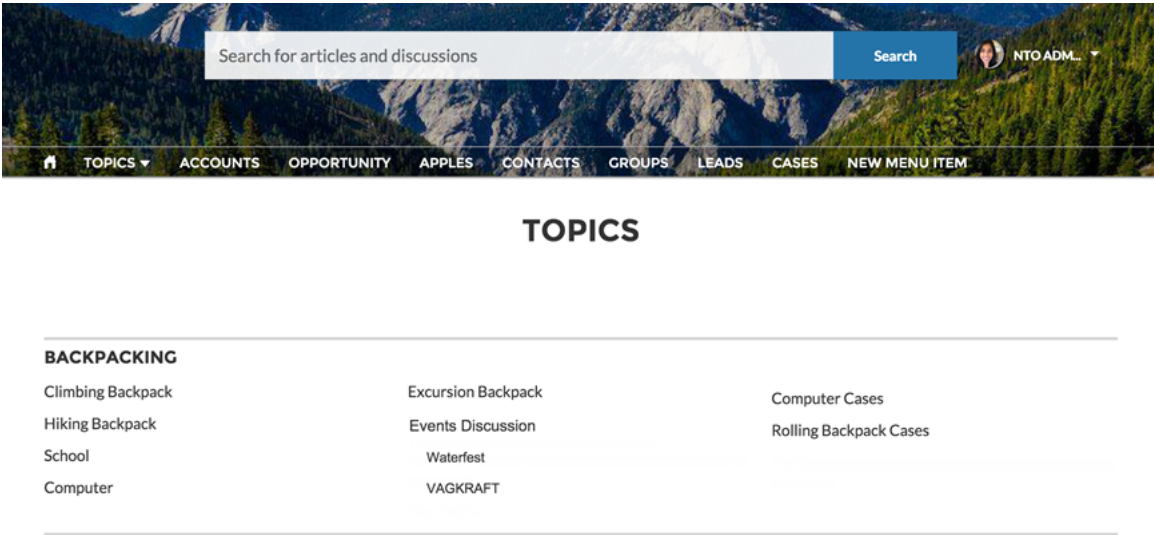
The following is the maximum number of navigational topics and subtopics you can have in a Customer Service (Napili) community template.

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.



SEE ALSO:

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

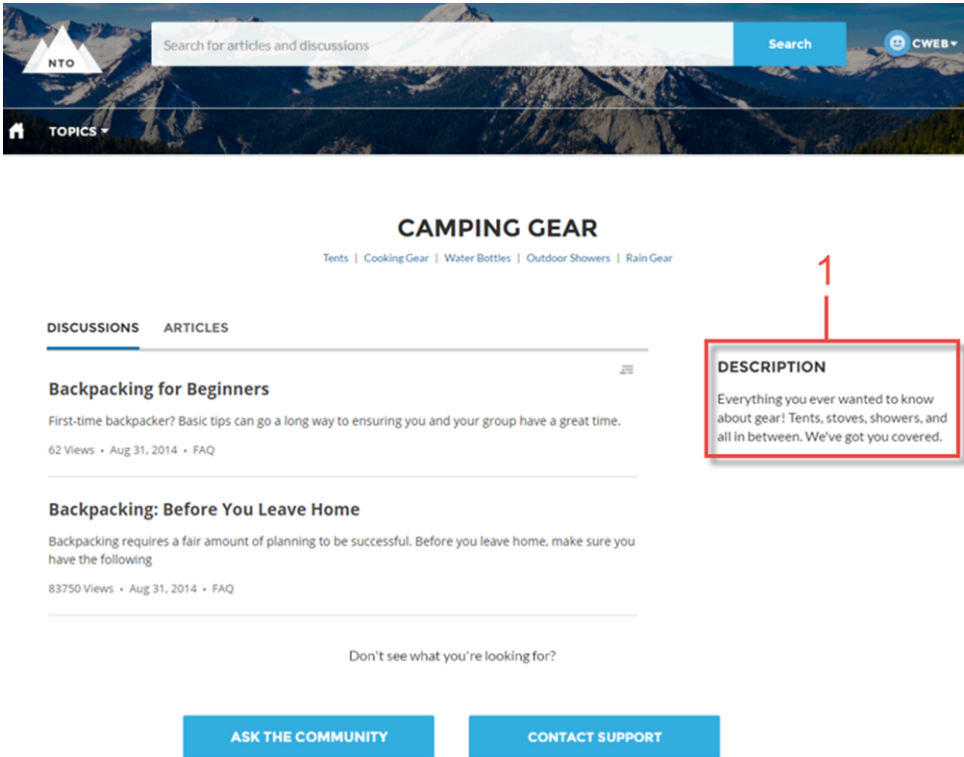
## Topic Description

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.
Title	Enter text for the title. The default text is <code>Description</code> .

 **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.
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.

Property	Details
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.

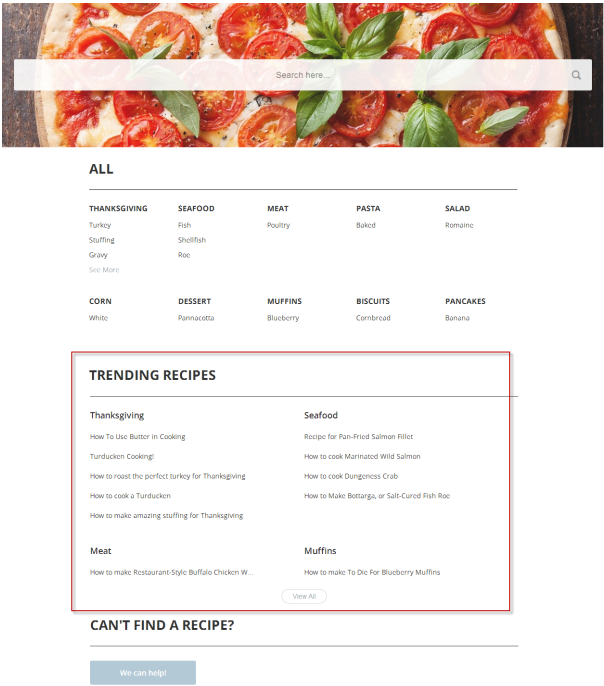
An article's popularity is based on the number of recent views. You can specify two different display options for this component:

- 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:

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.
Number of Articles	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.
Number of Categories	<p>Enter the maximum number of categories to display in the component. This value controls whether the trending articles are organized by category or not:</p> <ul style="list-style-type: none"> <li>• To view a list of trending articles that isn't organized by categories, type <i>0</i> in the field.</li> <li>• To view trending articles organized by data category, specify the number of categories to display.</li> </ul> <p> <b>Note:</b> 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.</p>
Title	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.

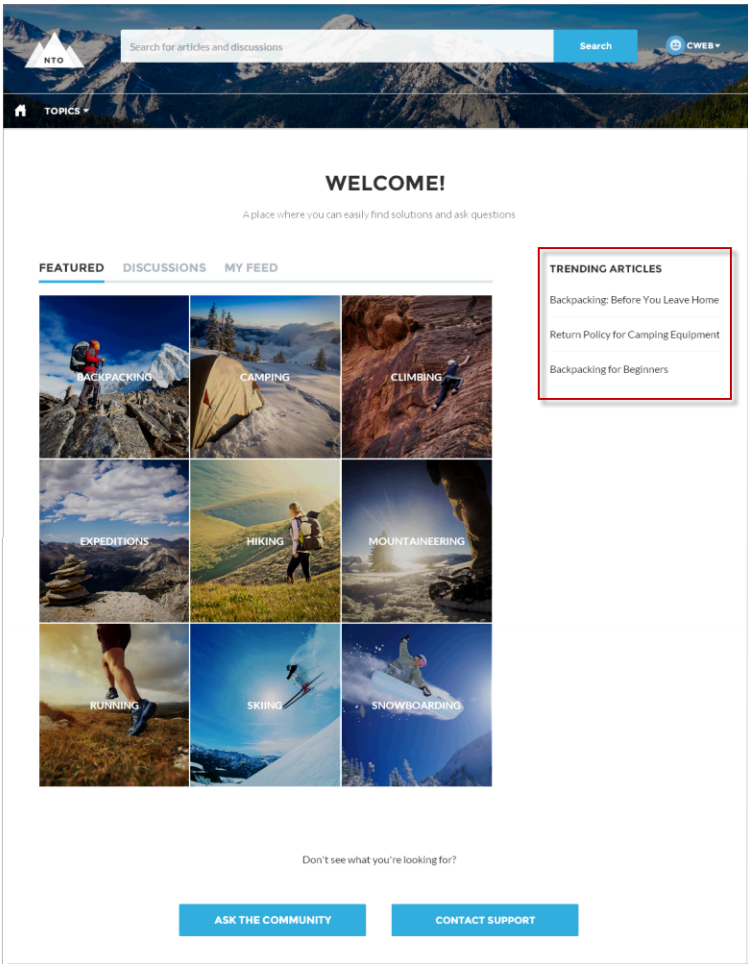
 **Note:** Before Spring '16, this component was named Topic Trending Articles.

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	Enter the text that is the title for the component. The default text is <i>Trending Articles</i> .
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.

 **Example:** Sample Trending Articles by Topic component:



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

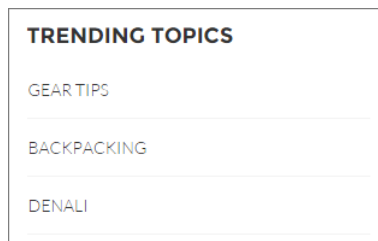
## Trending Topics

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 <code>Trending Topics</code> .
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 questions created after the Spring '17 release are displayed in the Unanswered Questions component.

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

Property	Details
Title	The title of the component. The default text is <i>Do you have the answer?</i>
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.

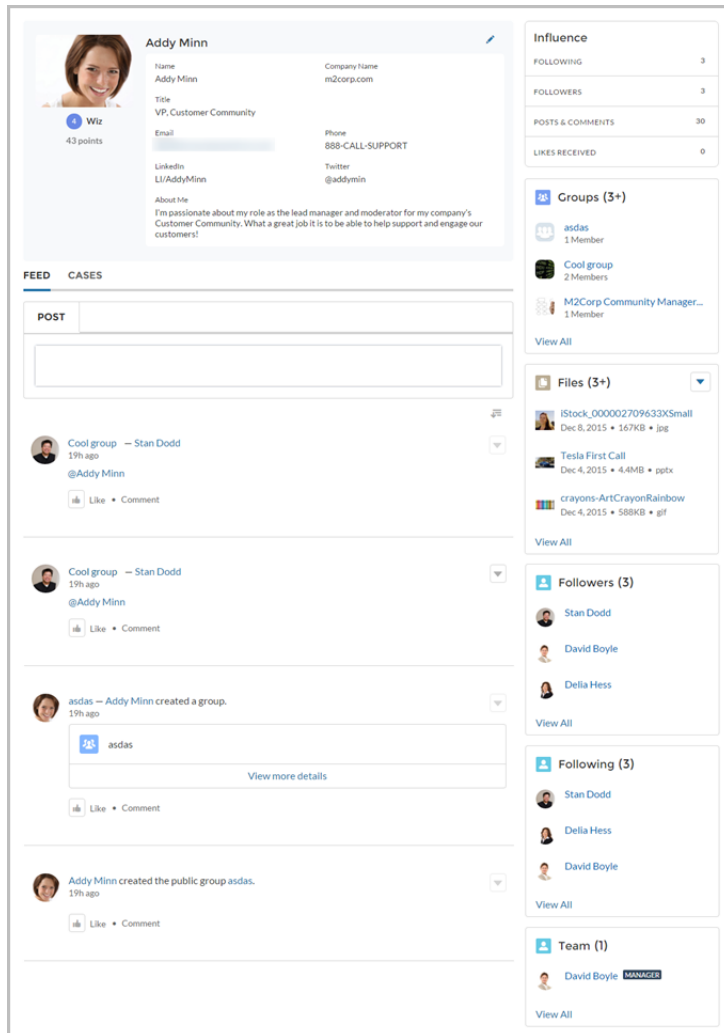
If you prefer to use a different layout or want more granular control over the placement of user profile content, create a custom community page and use the User Profile Summary, User Profile Tabs, User Profile Statistics, User Profile Knowledgeable About, and User Profile Related List components.

1. Select the **User Profile** component in the page you're configuring.
2. Select the Properties pane to view properties for the component:

Property	Details
User ID	The system supplies this value so that authenticated users can view their own information. Don't update this field.
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.
Show Influence	Determines if the user's Chatter statistics are shown. Statistics include number of posts and comments, likes received, followers, and people they're following.
Influence Label	Enter a title for the Influence list. The default text is <i>Influence</i> .
Show Knowledgeable About	Determines if the Knowledgeable About list is shown.
Knowledgeable About Label	Enter a title for the Knowledgeable About list. The default text is <i>Knowledgeable About</i> .
Maximum Topics in 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.
Show Related Lists	Determines if related lists are shown. Related lists can include Followers, Following, Groups, and Files.
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 <i>Cases</i> .
Cases Tab Header Label	Enter the text for the label that appears at the top of the list of cases. The default for this field is <i>My Cases</i> .
Case Filter Name or ID	Enter the name of the list view that displays 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 <i>Create Case</i> .
Record Details Tab Label (Mobile only)	Determines if a tab appears for the record details. Record details include profile details, Knowledgeable About, and Influence. The tab label is <i>Details</i> . Available only when a community is viewed on a mobile device.
Related Records Tab Label (Mobile only)	Determines if a tab appears for related records, such as Groups, Files, Followers, and Following. The tab label is <i>Related</i> . Available only when a community is viewed on a mobile 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.

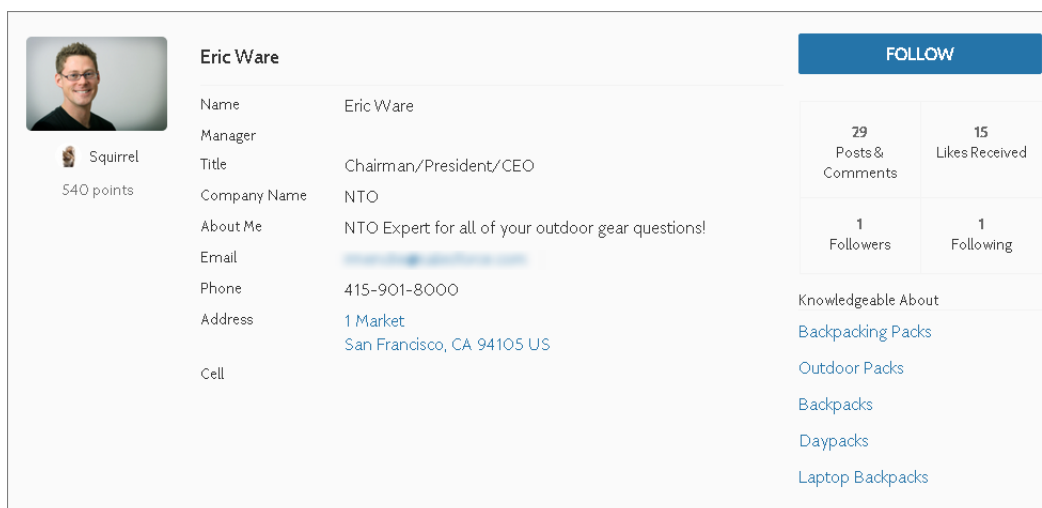
If nickname display is enabled for the community, the nickname is shown in place of the full name when a user views another user's profile. The full name is shown when a user views their own profile.

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.

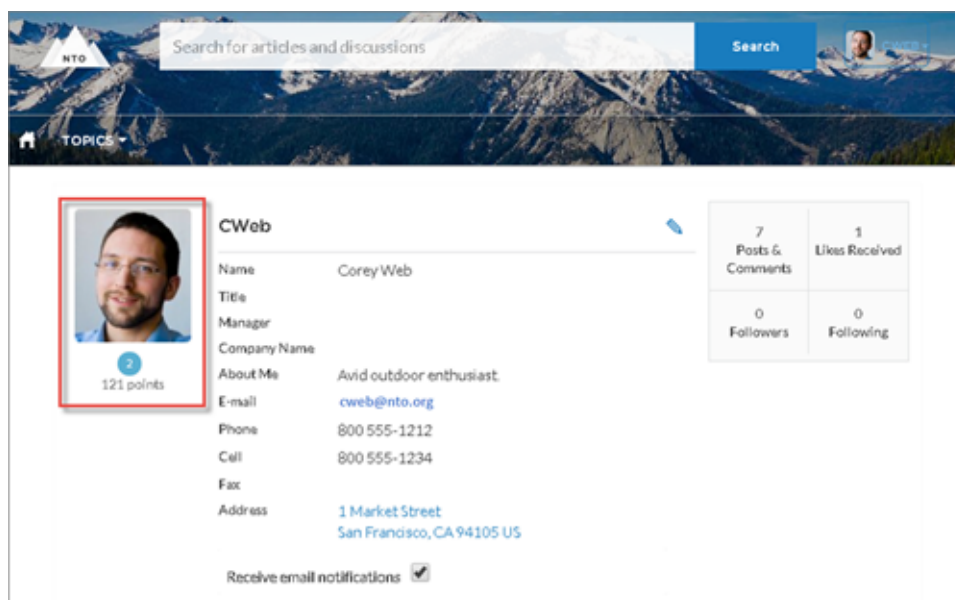
You can find the user profile image component in the Profile page. This component allows users to upload their profile photos in the community.

 **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.

 **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.

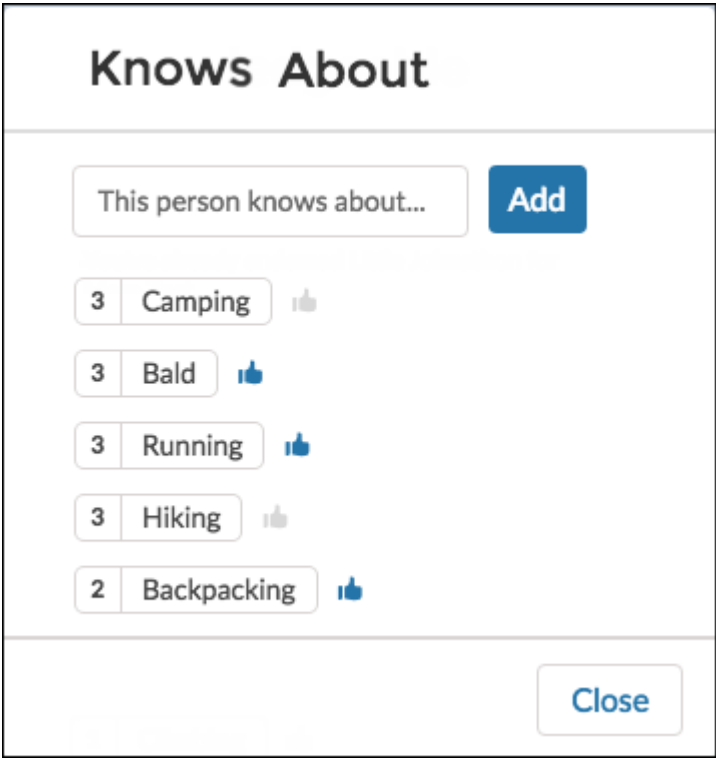
Community members endorse one-another on existing topics, and they can use the widget to enter new topics for endorsements. The widget shows the number of endorsements members have for each topic they know about. Clicking the thumbs up buttons adds or removes endorsements, based on whether the member 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 <b>Knows About</b> .
Maximum Topics Displayed	Enter the maximum number of topics listed for each user, up to a limit of 10.


 Example:



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

### User Profile Related List

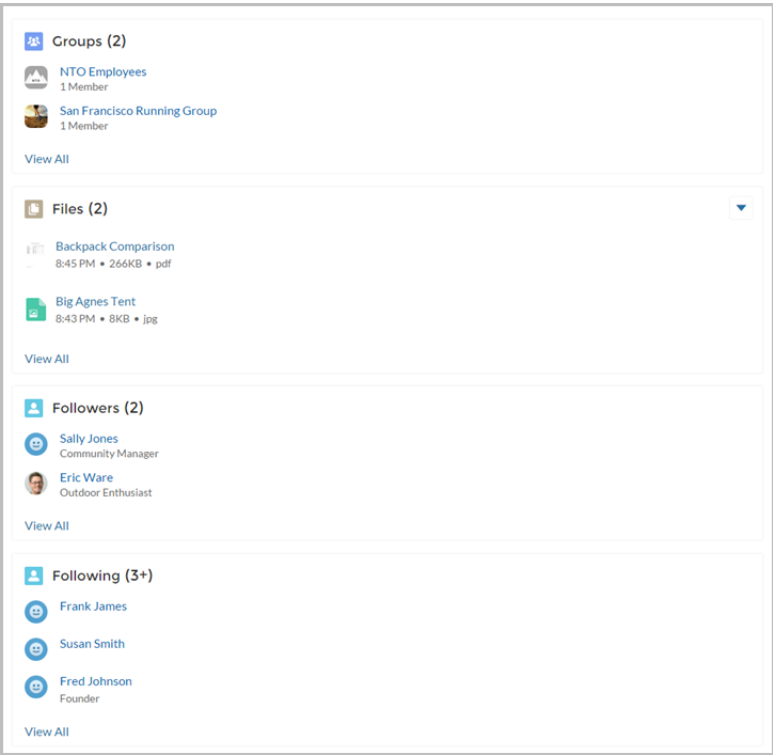
The User Profile Related List component shows lists of a user’s files, groups, followers, and who they’re following.

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?](#)

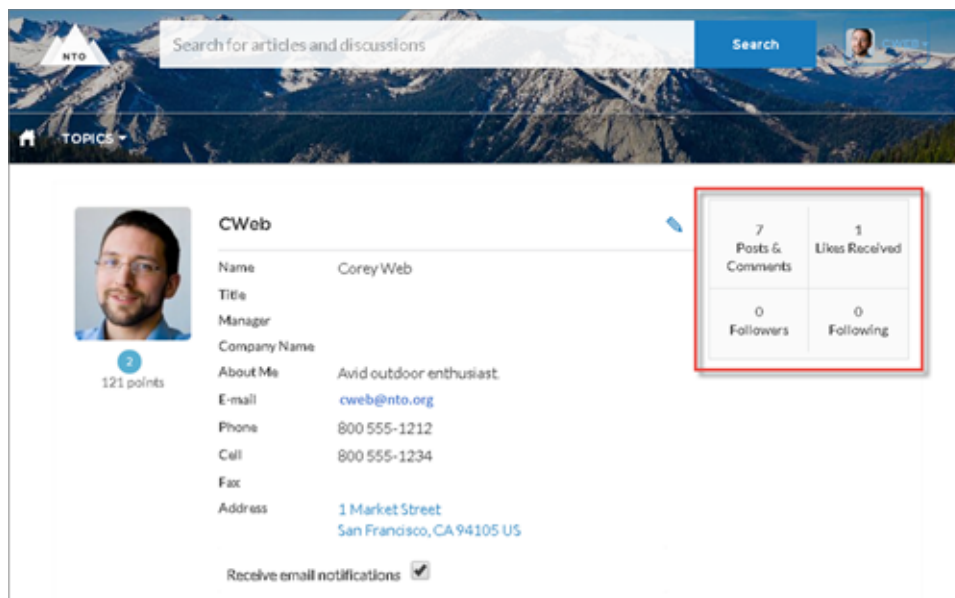
User Profile Stats

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.

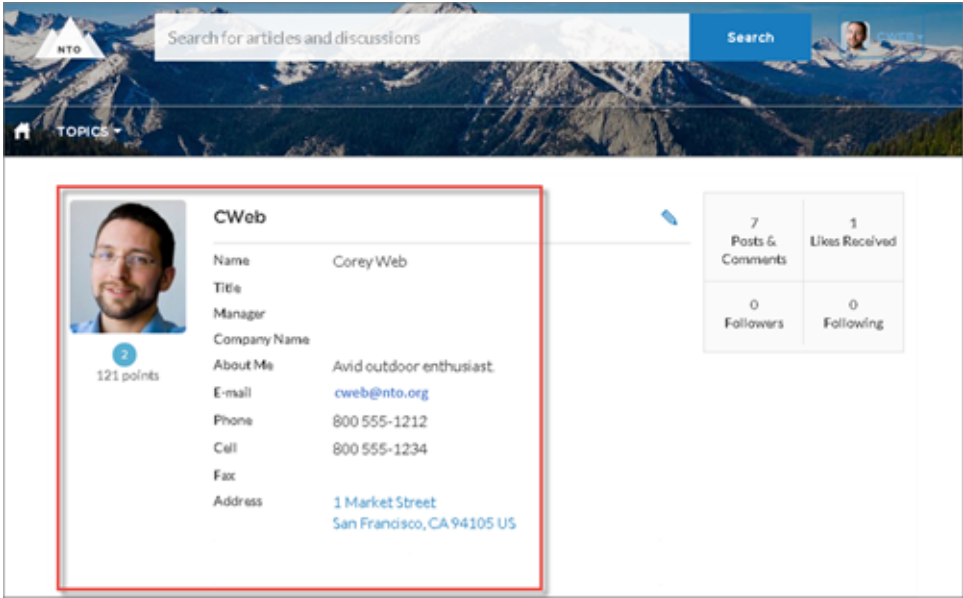
You can add the User Profile Summary component to the Profile page. This component allows users to edit their profile information from the community. When viewing another user’s profile, you can click their address to see a Google map of their location.

 **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.


 **Note:** When viewing a community on a mobile device, the Google map appears below the address.


 **Important:** To avoid issues, make sure that the User Profile Summary & Image component and the Case List component occupy different regions of the My Cases page. They occupy different regions by default, but it is a good practice to verify in your community.

To check, navigate to the My Cases page in Community Builder, go to the Page Editor, and click . If the two components are listed under one region—for example, Content—drag one to a different region.

- 1. Select the **User Profile Summary & Image** component in the page you’re configuring.
- 2. To view properties for the component, select the Properties pane.

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:



1

2 points

Eric Ware

Name

Eric Ware

Title

Manager

Company Name

Visit San Francisco, Inc.

About Me

Email

[eric.ware@salesforce.com](#)


Phone

Cell

Fax

Address

1 Market St.  
San Francisco, CA 94105 USA




## User Profile Tabs

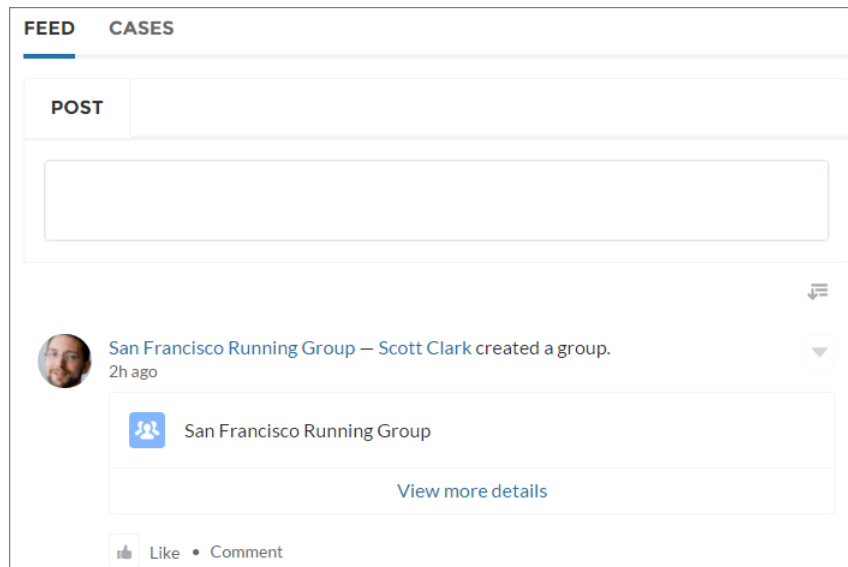
The User Profile Tabs component lets users see their feed and cases on their profile. They can also post to their feed directly from their profile. When viewing another user’s profile, they see the user’s activity but not their cases.

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.

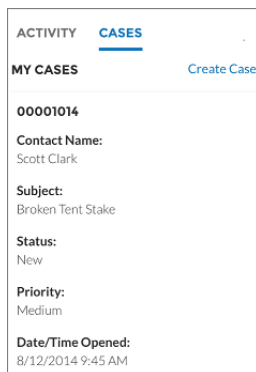
1. Select the **User Profile Tabs** component in the page you're configuring.
2. In the property editor, configure properties for the component:

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 <i>Cases</i> .
Case Filter Name or ID	Enter the name of the list view that displays cases.   <b>Note:</b> 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 <i>My Cases</i> .
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 <i>Create Case</i> .
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	Details
User ID	The system supplies this value. Don't update this field.

 **Example:** Sample User Settings component:

MY SETTINGS

CANCEL

SAVE

ACCOUNT

Username

msmith@nto.org

Email Address \*

Change Password

LOCATION

Language

English

Locale

English (United States)


Time Zone

(GMT-08:00) Pacific Standard Time (Amer

PROFILE VISIBILITY

Choose to show profile details to guest users who aren't logged into the community.

☐

Make profile public 

EMAIL NOTIFICATIONS

Choose to receive emails so that you don't miss important updates.

☒

Receive emails

Email me when someone...

☒Follows me

☐Likes a post or a comment I made

☒Comments on my status or a change I made

☒Comments on a post on my profile

☒Comments after me

☒Comments on an item I bookmarked

☒Comments on an item I like

☒Mentions me in a post

☒Mentions me in a comment

☒Posts on one of my cases

CANCEL

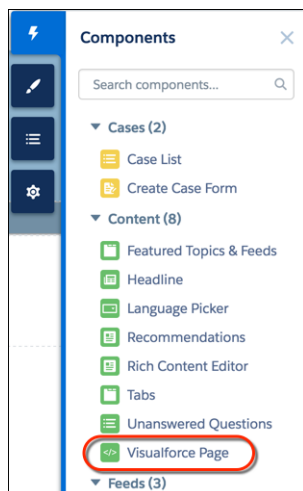
SAVE

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

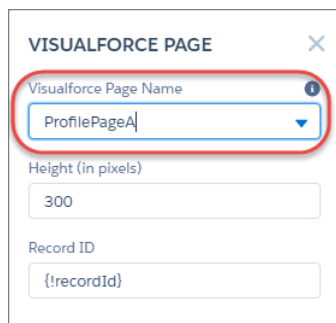
## Visualforce Page Component

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.

### 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

## Wave Dashboard

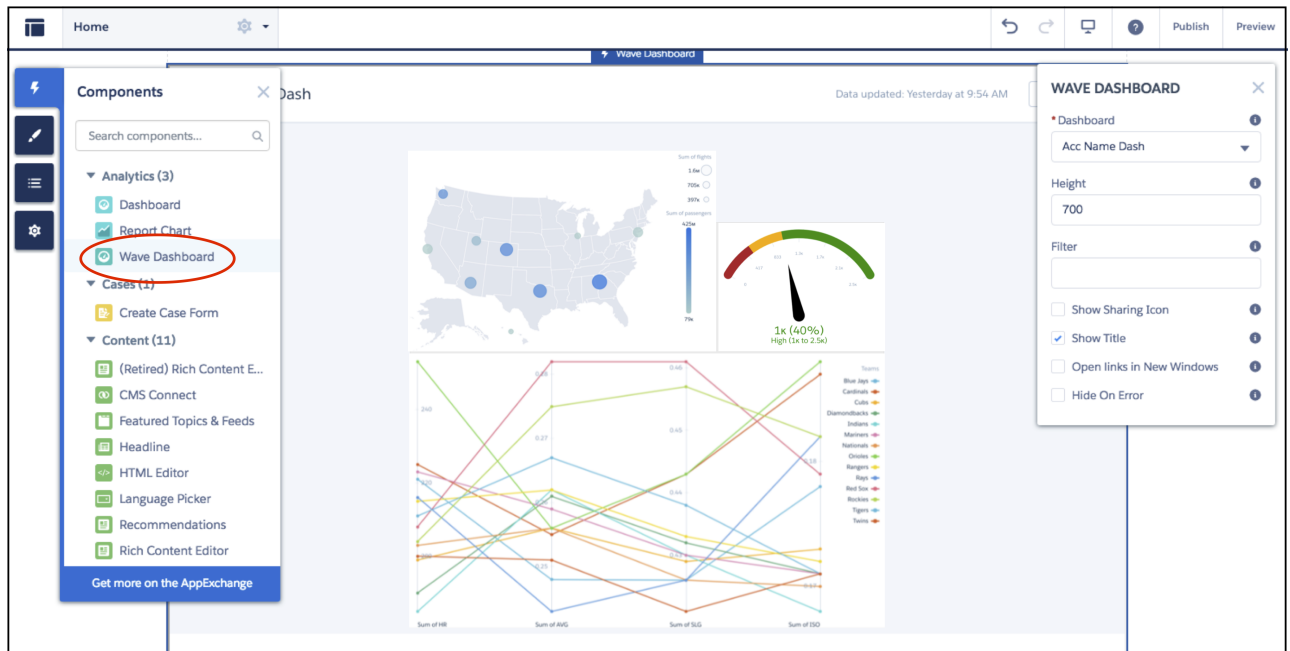
Use the Wave Dashboard component to add Wave Analytics to your community's pages.

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

Property	Details
Dashboard	Select an available dashboard from the dropdown list.
Height	Specify the height of the dashboard, in pixels. The default is 300.
Show Sharing Icon	Add the Share icon on the dashboard. Users can click the icon to open the Share dialog, where they can post to Chatter and download images and data. Default is false.
Show Title	Control the visibility of the dashboard title. Default is true.
Open Links in New Windows	Specify where links from the dashboard to other assets are opened. Default is true.
Hide On Error	Control whether the Wave Analytics dashboard appears if there is an error, such as the dashboard can't be found. Default is false.
Filter	<p>Add selections or filters to the embedded dashboard at runtime. You can filter dataset fields by variables or specified values. The filters are configured with JSON strings. For filtering on dimensions, use this syntax:</p> <pre>{'datasets' : {'dataset1': [ {'fields': ['field1'], 'selection': ['\$value1', '\$value2']}, {'fields': ['field2'], 'filter': { 'operator': 'operator1', 'values': ['\$value3', '\$value4']} ]}}}</pre> <p>For filtering on measures, use this syntax:</p> <pre>{'datasets' : {'dataset1': [ {'fields': ['field1'], 'selection': ['\$value1', '\$value2']}, {'fields': ['field2'], 'filter': { 'operator': 'operator1', 'values': [[\$value3]] } } ]}}</pre> <p><b>datasets</b> takes dataset system names which are found in the left panel of the edit page for a dataset. (If your org has namespaces, include the namespace prefix and two underscores before the dataset system name.) <b>fields</b> takes dimensions or measures in the dataset. To find the names, click the Explore icon to open the widget, select Show SAQL from the Options menu. <b>values</b> can be specific values or fields in a Salesforce object To find the name of a field, go to Setup, locate the object you want, and select Fields. Use the Field Name (also known as the API name). For custom fields, use the name with "__c" at the end. With the <b>selection</b> option, the dashboard is shown with all its data, and the specified dimension values are highlighted. The selection option can be used alone or with the filter option. Selection takes dimension values only. To use this option, the dashboard must include a list, date, or toggle widget that groups by the specified dimension. With the <b>filter</b> option, the dashboard is shown with only filtered data. The filter option can be used alone or with the selection option. Filter takes dimension or measure values. Use <b>operator</b> with the filter option. Supported operators for dimensions: in; not in; matches Supported operators for measures: = ; &gt; ; &gt;= ; &lt;= ; &lt; . Note: If a filter or selection can't be applied, the attribute is ignored and the dashboard appears with all its data and no selection.</p>



**Example:** Wave Dashboard component:



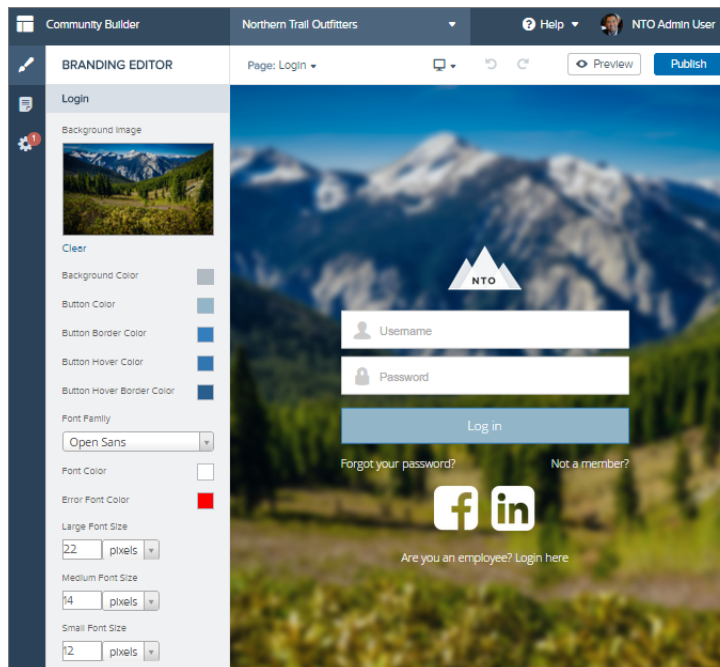
## Login Components

### Brand the Login Pages

Use the Community Builder to customize and brand the login pages with your own design. You can change the appearance of the login pages with a background image, color scheme, and font settings. Use Community Builder to set the background. Your preference applies to all login pages, unless you override the settings within an individual page.

1. Select **Go To Community Builder**, if you're not already in it.
2. From the Go To menu, select **Login**.
3. In the left pane, upload an image for the background, and set color and text preferences, as needed.

 **Example:** The Branding Editor settings in Community Builder:




SEE ALSO:

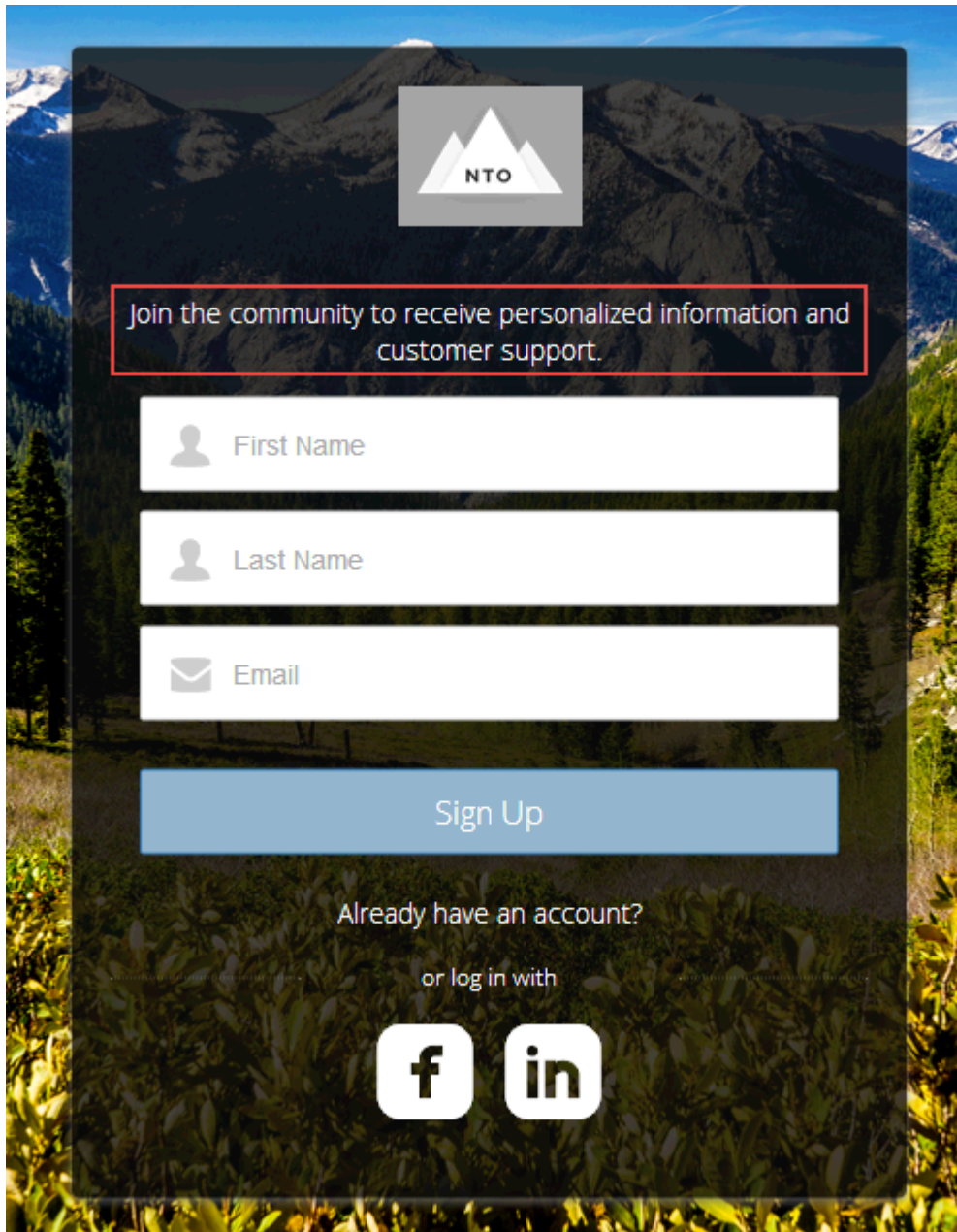
[Which Components Can I Use with Each Template?](#)

## Set Up the Content Block

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

1. In Site.com Studio, select the **Content Heading** or **Content Description** component in the page that you're configuring.
2. Click .
3. Select **Edit HTML**.
4. Enter the text that you want to display on the page.

 **Example:** Sample Content Block component with an introduction to a self-registration form:




SEE ALSO:

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

## Custom Code

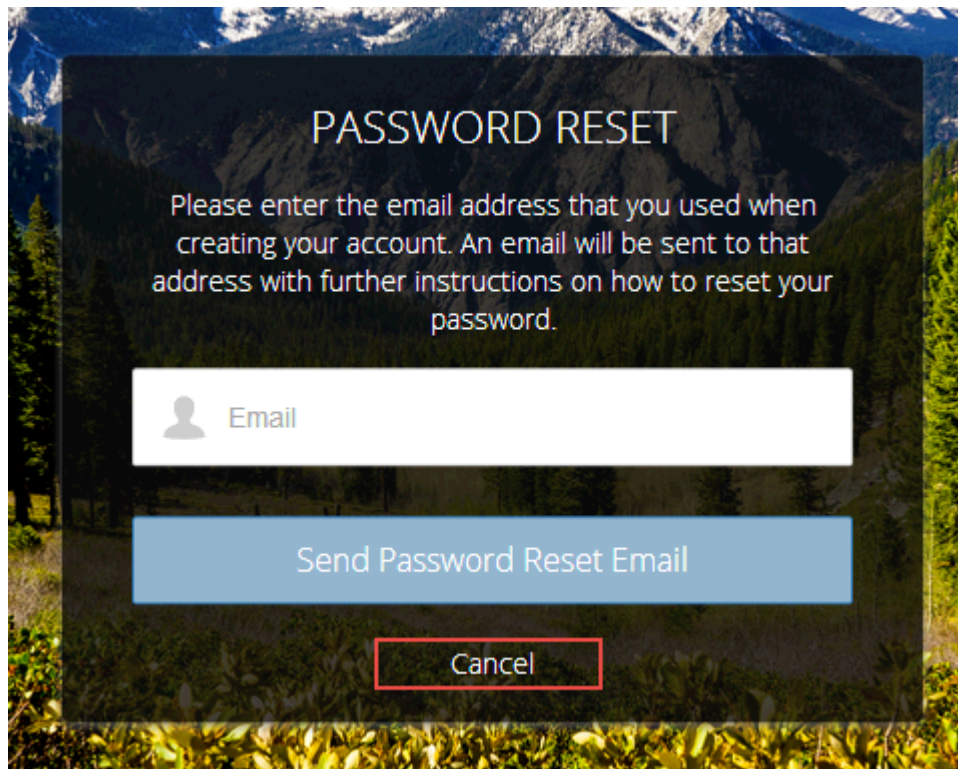
Use Custom Code components to send users to a specific page within your community.

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

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



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



SEE ALSO:

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

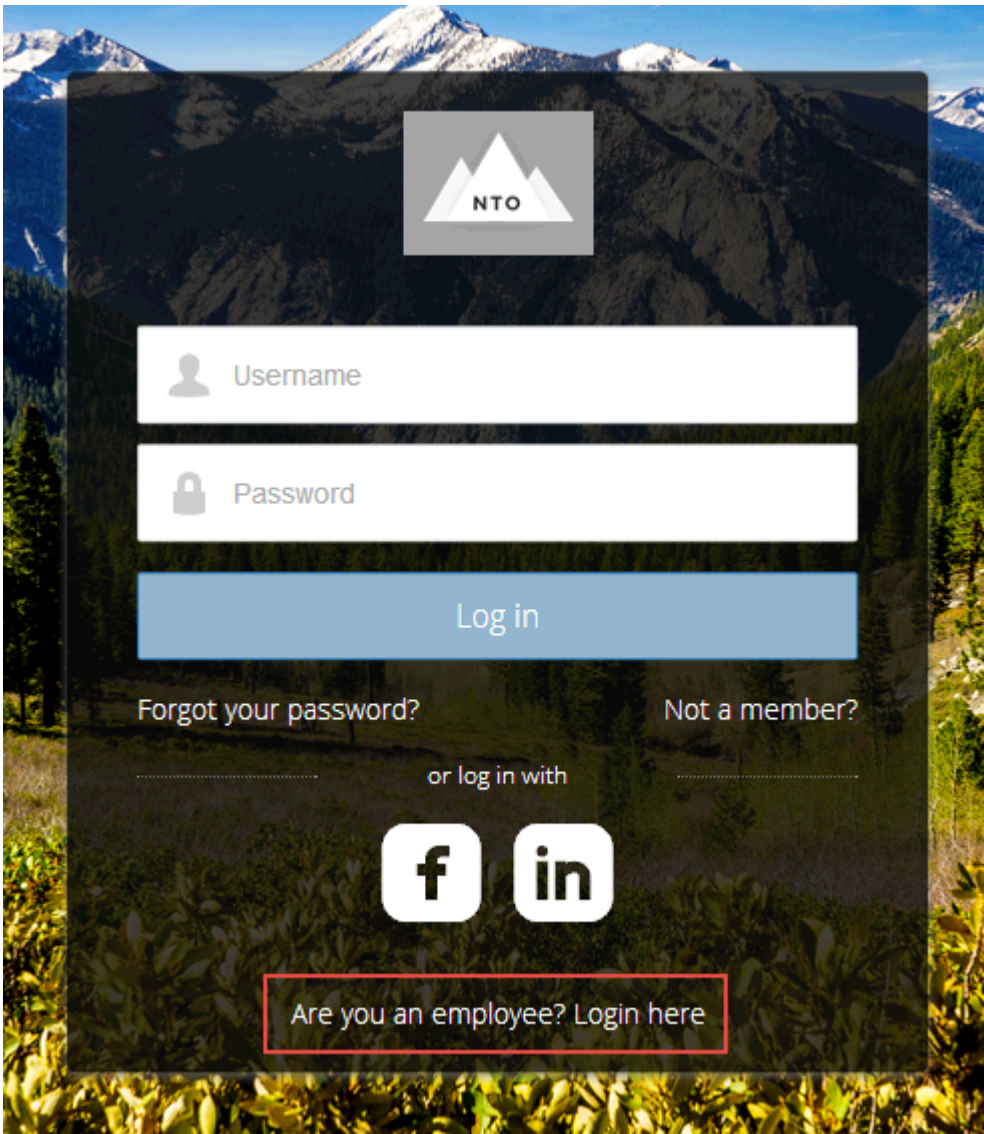
## Employee Login Link

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 <i>Are you an employee? Login here.</i>

 **Example:** Sample Employee Login Link component:



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

**Forgot Password**

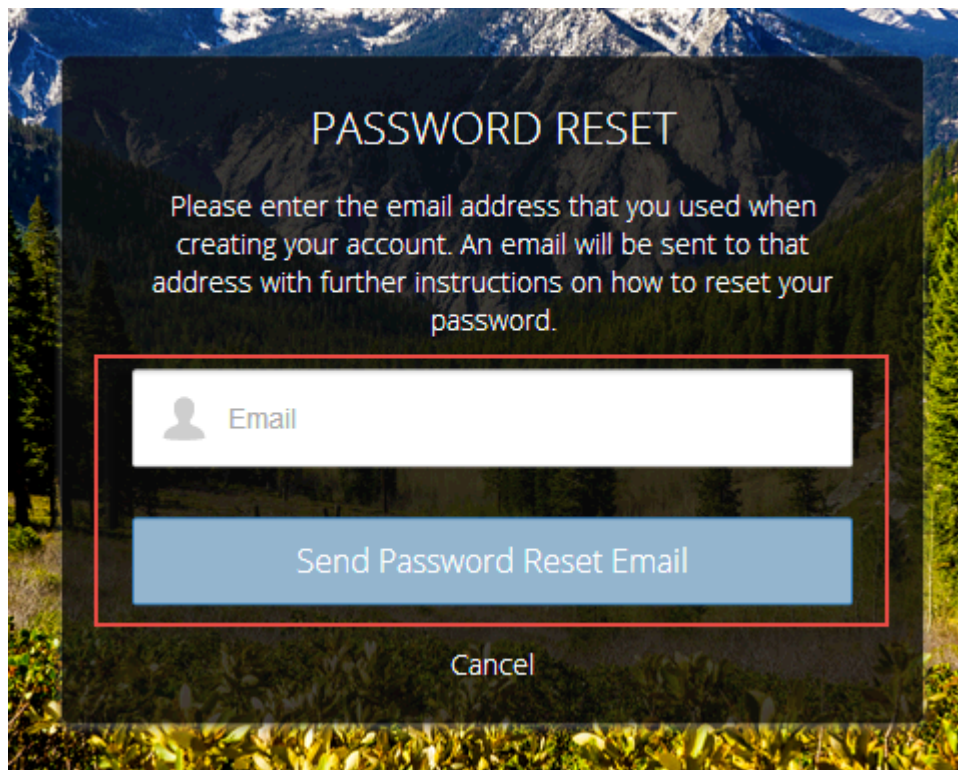
Use the Forgot Password component to let users request a new password.

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.

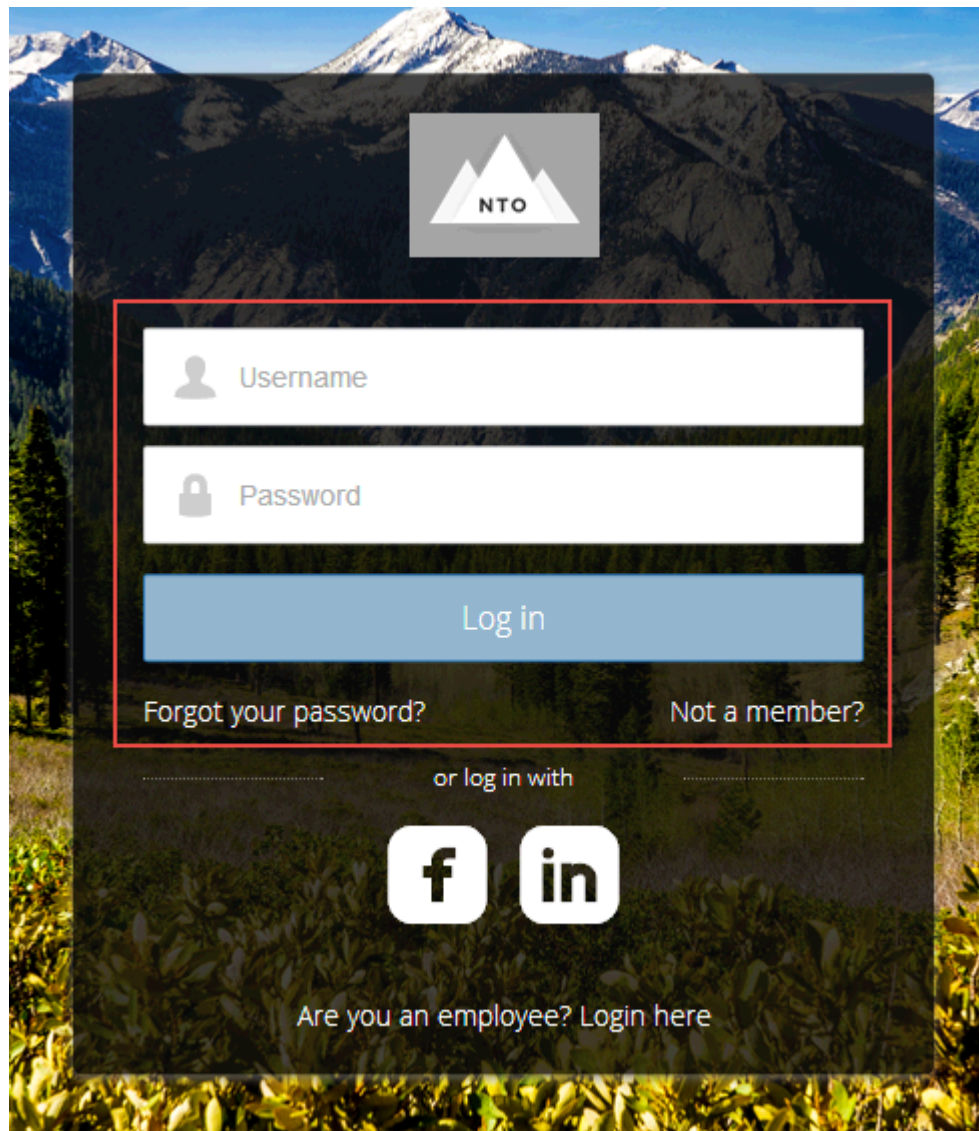


**Note:** If the community administrator deselects the username and password checkbox on the **Administration > Login & Registration** page in Community Management, the Login Form doesn't appear in the published community. For more information, see "Customizing Communities Login" in the Salesforce Help.

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.

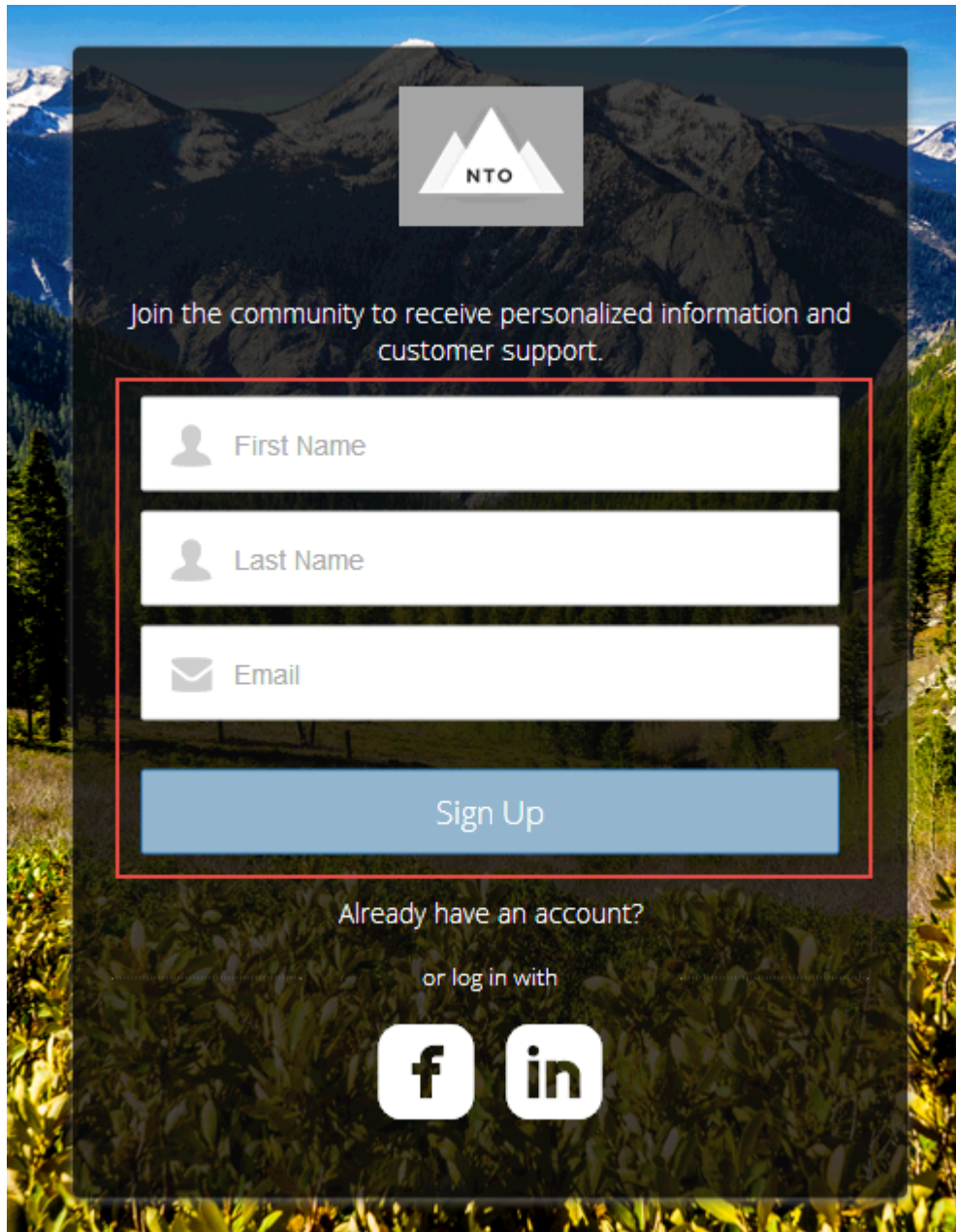
For this component to appear, go to Community Management and select **Administration > Login & Registration > Allow external users to self-register**.

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:

A sample self-registration form for a community. The form is overlaid on a scenic background of mountains and a forest. At the top, there is a logo consisting of three white triangles of increasing size, with the letters 'NTO' in the center. Below the logo, the text 'Join the community to receive personalized information and customer support.' is displayed. The form itself is enclosed in a red rectangular border and contains four white input fields. The first field is labeled 'First Name' with a person icon on the left. The second field is labeled 'Last Name' with a person icon on the left. The third field is labeled 'Email' with an envelope icon on the left. Below these fields is a blue button with the text 'Sign Up'. Below the button, the text 'Already have an account?' is displayed, followed by 'or log in with' and two social media icons: Facebook and LinkedIn.

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® or LinkedIn®. Set these icons for each authentication provider that you configure for the org.

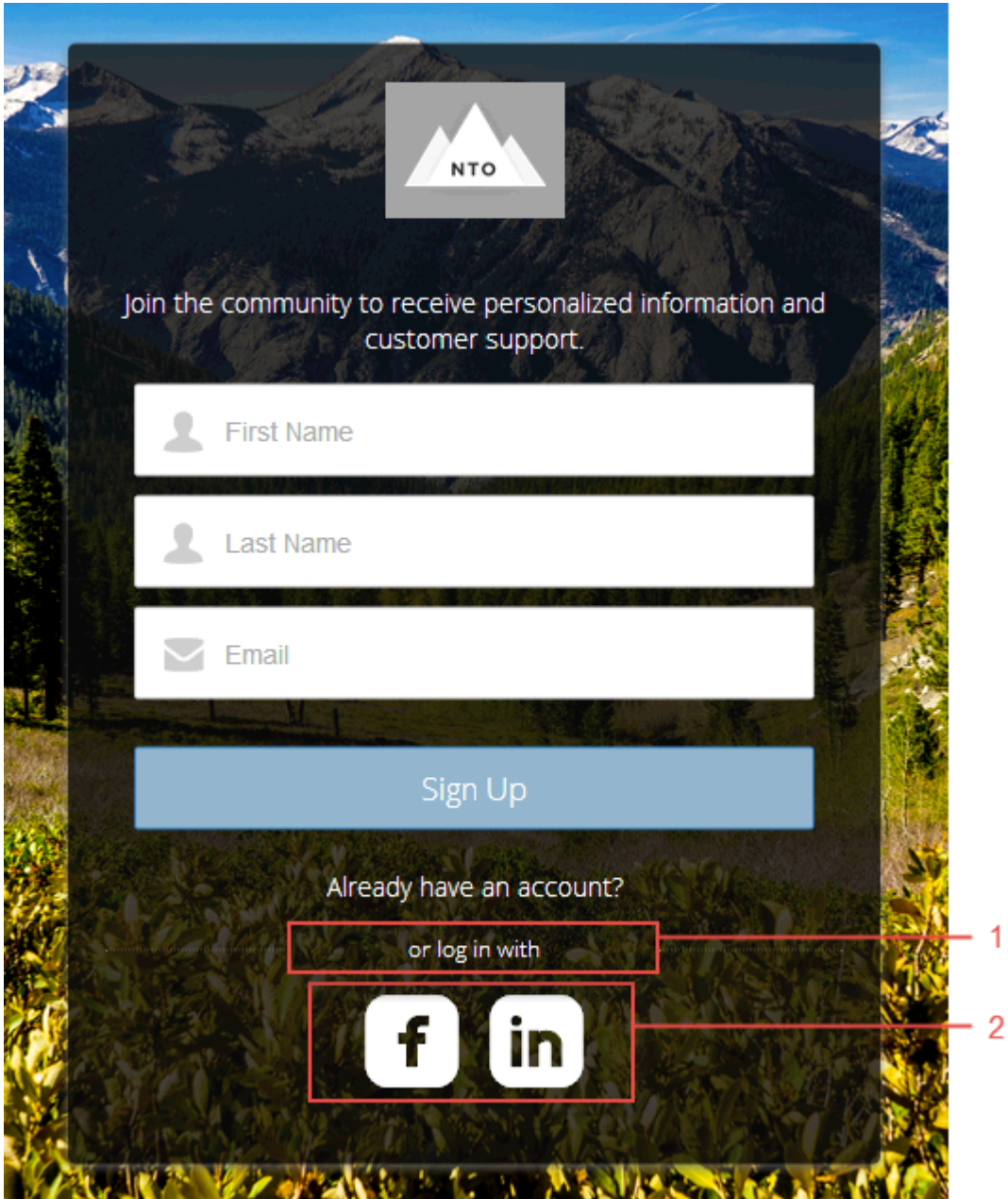
Some users prefer to use an existing account with a service such as Facebook to log in to the community instead of setting up a new account and password. The third-party service is an authentication provider that verifies the identification of the user. Use the Social Login component to add an icon for each supported authentication provider. The user clicks the icon and logs in using the associated account's username and password.

Before you add the Social Login component, set up each authentication provider. For more information, see "Configuring Authentication Providers" in the Salesforce Help.

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

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):



The image shows a sample social login component overlaid on a scenic mountain background. At the top is the NTO logo, which consists of three white triangles forming a mountain shape with the letters 'NTO' below them. Below the logo is the text 'Join the community to receive personalized information and customer support.' This is followed by three input fields: 'First Name' with a person icon, 'Last Name' with a person icon, and 'Email' with an envelope icon. A blue 'Sign Up' button is positioned below these fields. Underneath the button is the text 'Already have an account?'. Below this text is a red box containing the text 'or log in with', which is labeled with a red line and the number '1'. Below this box is another red box containing the Facebook 'f' and LinkedIn 'in' icons, which is labeled with a red line and the number '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™ 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.

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

## 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

### 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.

#### [Find and Create Asset Files in Community Builder](#)

Upload and select images for your header, logo, rich content editor, and custom components using the file selector in Community Builder. Once uploaded, files are converted to packageable asset files and stored in your org asset library for easy reference and retrieval.

### [Community Builder Settings](#)

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

### [Preview Your Community with Community Builder](#)

Preview how your community appears in a desktop browser window and on mobile devices.

### [Publish Your Customizations with Community Builder](#)

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

#### SEE ALSO:

[Navigate Community Builder](#)

[Community Builder Settings](#)

[Implementation Guide: Using Templates to Build Communities](#)

## Navigate Community Builder

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

To access Community Builder:

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

In Community Builder, you can:

- Drag and drop Lightning components onto your page (1). The Components panel includes custom Lightning components from the AppExchange.
- [Brand the community](#) to match your organization's style (2).
- View all the components on the current page. To edit a component's properties, select the component. (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

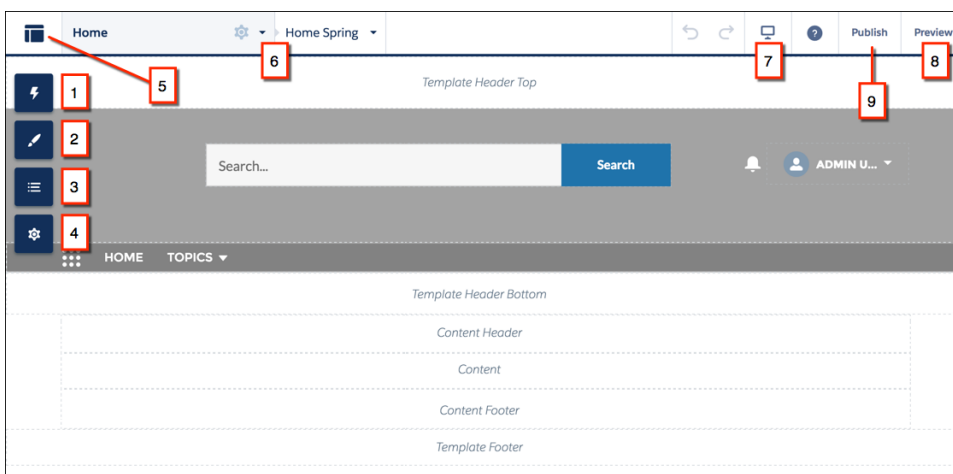
Available in: Salesforce Classic and Lightning Experience

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](#)
[Community Builder Settings](#)
[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 for your template with the color palette.
- Choose colors for text, actions, links, and borders.
- Upload your own company logo image to generate a custom color palette based on its main colors.
- Specify font family, style, weight, and case.
- Change header and page background color.
- Use custom CSS to apply your own styles.

### EDITIONS

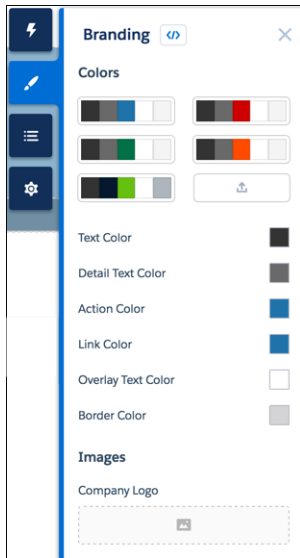
Available in: Salesforce Classic and Lightning Experience

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

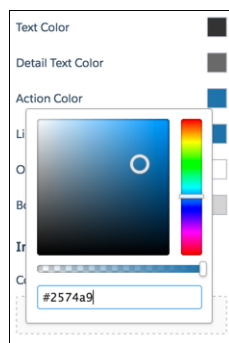
### USER PERMISSIONS

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.

When you add an image to your community for the first time, an asset file is automatically created and stored in the Org Asset Library.



**Note:** If public access is enabled in Community Builder at the page or community level, the **Let guest users view asset files on public and login pages** preference is enabled in **Administration > Preferences**. This preference remains enabled as long

as any page has public access enabled. If you upload images for use on community login pages, be sure that this preference is enabled.

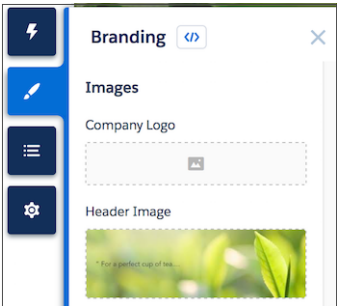
SEE ALSO:

- [Community Builder Overview](#)
- [Preview Your Community with Community Builder](#)
- [Find and Create Asset Files in Community Builder](#)
- [Implementation Guide: Using Templates to Build Communities](#)
- [Find and Create Asset Files in Community Builder](#)

## Find and Create Asset Files in Community Builder

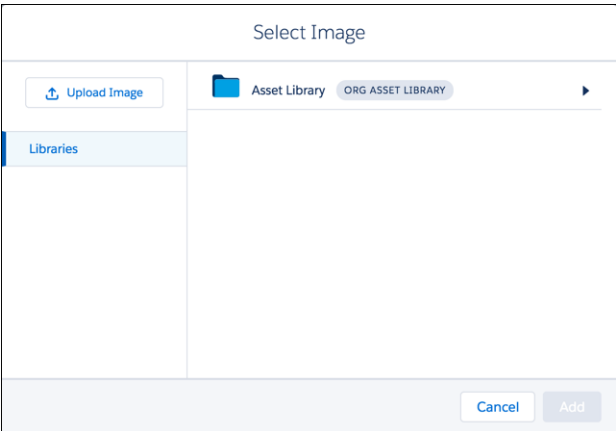
Upload and select images for your header, logo, rich content editor, and custom components using the file selector in Community Builder. Once uploaded, files are converted to packageable asset files and stored in your org asset library for easy reference and retrieval.

1. From Community Builder, click an image icon in the Branding panel to open the unified file selector.



The file selector displays only image files, so you don't have to wade through all your files to find your logo or header image. If the image file you want is already an asset file, it's in the asset library, which is clearly marked by the Org Asset Library badge. Asset files for your Salesforce org and all your Communities are stored in the Org Asset Library, so you don't need to maintain copies in different places.

2. Select an existing file or click Upload Image to add a new one.



### 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 add an image to your community for the first time, an asset file is automatically created and stored in the Org Asset Library. Admins have full access to the Org Asset Library and can search for, tag, and subscribe to asset files.

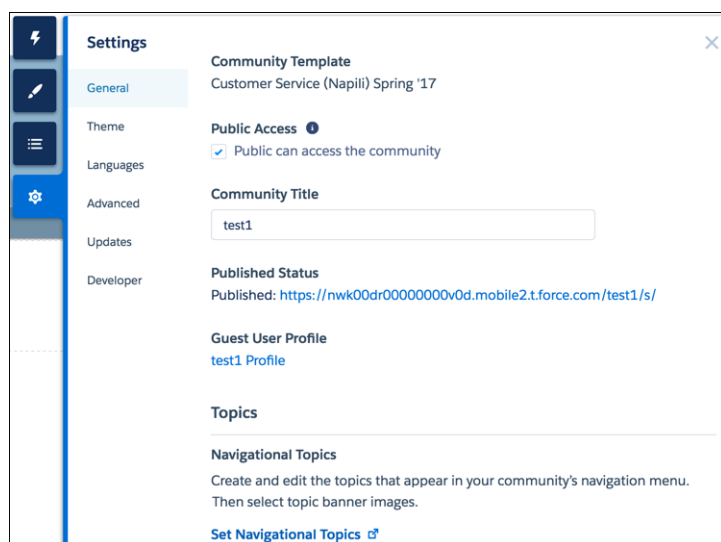
To provide library access to users, add them as members of the library with the appropriate permissions. Users without these permissions don't see the Org Asset Library. The Org Asset Library is available in all new orgs, and is automatically activated in existing orgs.

 **Note:** If public access is enabled in Community Builder at the page or community level, the **Let guest users view asset files on public and login pages** preference is enabled in **Administration > Preferences**. This preference remains enabled as long as any page has public access enabled. If you upload images for use on community login pages, be sure that this preference is enabled.

## Community Builder Settings

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

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



### EDITIONS

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### General

In the General area, settings include:

#### Community Template

Displays the name and version of the template that your community is using.

#### Page Access

Specifies the level of access to the page. When you enable public access, guest users can view asset files on public pages by default. Users whose profile settings are more restrictive may not be able to view this page, even if you choose Public.

When you enable public access, the preference **Let guest users view asset files on public pages** in **Administration > Preferences** is automatically enabled.

**Community Title**

Lets you set the title for your community. The title briefly appears in the browser's title bar before your community's Home page loads.

**Published Status**

Indicates whether your community is published. If it's published, click the link to open the live community in a separate browser tab.

**Preferred Domain**

Lets you choose which domain to use for indexing your community's pages to improve search engine results. (Multiple domains for the same community can dilute search engine results and lower page ranking.) The Preferred Domain dropdown appears only after you set up domains and custom URLs for your community in Setup.

If the Require Secure Connections (HTTPS) option is enabled in Site Configuration in Site.com Studio, you can set only HTTPS preferred domains.

**Guest User Profile**

Displays the associated guest user profile. Clicking the link takes you to the Profile page in Salesforce Setup, where you can modify profile settings, such as which permissions the guest user has. For more information about configuring the guest user profile, see "Configure the Guest User Profile for Unauthenticated Users" in the [Using Templates to Build Communities Guide](#).

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

[Define featured topics](#) and [topics to be used for navigation](#) in Community Workspaces or Community Management.

**Theme**

In the Theme area, you can [control the layout and appearance](#) of each page in your community.


**Languages**

In the Languages area, 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.

**Advanced**

In the Advanced area, you can [track page views](#), [add markup to the page head](#), and show all components in the Components panel.

By default, we filter the components available in the Components panel according to each page's purpose. For example, the Case Comments Publisher is available only for the Case Details page. When you enable **Show all components**, you see the complete list of components when you open the Components panel for any page (except login pages). However, you can still only add the Related Questions List component to the Question Detail page and the Related Articles List component to the Article Detail page.

 **Important:** Some components require the page to pass specific parameters. When you remove component filtering, you can add a component that relies on a passed parameter to a page that doesn't pass any values. For the component to work correctly, you must manually configure the component's parameters.

For example, some components that take `{!recordId}` as a parameter expect to get this value from the page's URL. If you add the component to a page that doesn't pass this value through the URL, you must manually provide it.

Similarly, let's say you add the Group Detail component, which requires a `{!recordId}` value, to the Case Detail page instead of the Group Detail page. Although both pages pass a `{!recordId}` value, the ID that Case Detail passes is incorrect.

**Updates**


In the Updates area, you can [update your community's template](#) to the latest version.

**Developer**

In the Developer area, you can [export customized Bolt solutions and pages](#).

## Update Your Community’s Template


We introduce new features and enhancements with every release, so don’t get left behind! Make the most from the latest Community Builder and template features. Typically, we automatically update your template to the latest version, so you can start adding the latest features to your community right away. However, when the changes are significant, you’re required to manually update your template.

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

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

Template Type and Version	What to Expect When Updating to Summer ‘17
Spring ‘17 Customer Service (Napili), Partner Central, and Lightning Bolt solutions	Unifies the branding properties of the login pages with the rest of the pages in your community.  Login pages lose several branding properties, but all other customizations are retained.
Winter ‘16 Customer Service (Napili), Koa, and Kokua	Updates the login pages to use the Lightning platform and components, and unifies their branding properties with the rest of the pages in your community.  Login pages lose all custom code and component customizations, along with several branding properties.

To manually update your template:

1. In Community Builder, click  > **Updates**.
2. Click **Update** and confirm the update when prompted.
3. Make sure that your login pages look correct, and reconfigure missing branding properties, custom code, and component customizations.
4. [Publish your community](#) to apply the template updates.

After you update your template, some old branding properties aren’t included in the Branding panel, and others map to different properties. Let’s take a closer look.

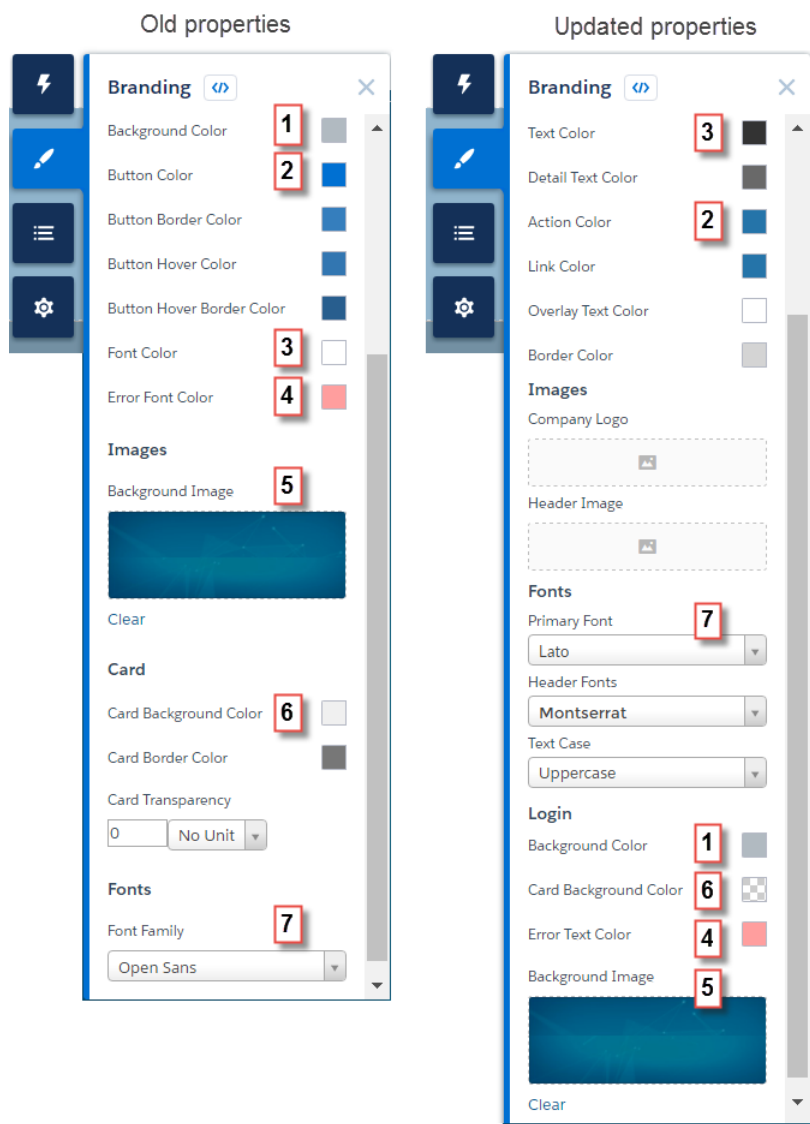
### EDITIONS

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



These previous login branding properties ...	Map to these updated branding properties ...
Background Color (1)	Background Color (1)
Button Color (2)	Action Color (2)
Button Border Color	—
Button Hover Color	—
Button Hover Border Color	—
Font Color (3)	Text Color (3)
Error Font Color (4)	Error Font Color (4)
Background Image (5)	Background Image (5)



These previous login branding properties ...	Map to these updated branding properties ...
Card Background Color (6)	Card Background Color (6) Also controls card transparency
Card Border Color	—
Card Transparency	—
Font Family (7)	Primary Font (7)

## SEE ALSO:

[Community Builder Settings](#)[Community Builder Overview](#)

## Considerations for Changing Your Community Template

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

-  **Note:** Starting with Winter '17, the ability to change templates is no longer supported for communities using the Koa, Kokua, and Customer Service (Napili) templates. The functionality is still available for these templates, but we recommend that you start afresh with a new community instead. If you do change your template from Koa, Kokua, or Customer Service (Napili) to another template type, Salesforce Customer Support will be unable to assist you if any problems arise.
- When you change your template, Salesforce object data carries over, but some branding and component customizations do not. Prepare to redo customizations as necessary.
  - Changing the community template updates the navigation options in Community Workspaces or Community Management. To view all available navigation options regardless of template selection, select **AdministrationPreferences > Show all settings in Community Workspaces or Community Management**.
  - Your community URL changes when switching from a Salesforce Tabs + Visualforce template to any other template type. Specifically, `/s` is appended to the community URL. Be sure to update any links to your community with the updated URL.
  - In active communities
    - When you switch over to the Koa, Kokua, or Customer Service (Napili) templates, your template change is saved in a draft version. Use the draft version to further customize your community in Community Builder. Your community is updated only after you publish your changes.
    - When you switch to the Salesforce Tabs + Visualforce template from any other template, your changes immediately reflect in your active community. In this scenario, we recommend that you deactivate your community before you change your template. Once you've made all your changes, reactivate the community.
    - If your template is listed as `None`, it means you're not using a predefined template or you are using a modified version of one of our templates.
-  **Note:** The Koa and Kokua templates are starting a phased retirement. In Summer '17, you can no longer use these templates to create communities. Salesforce still supports existing communities that were built using Koa and Kokua. To create a community based on Koa or Kokua, contact Salesforce Support. However, we recommend that you work with Salesforce Support on a

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

plan to replace your existing Koa and Kokua communities. New Lightning communities provide richer support for Knowledge and case management.

To learn more about using communities templates, see the [Using Templates to Build Communities](#).

To learn more about using the Aloha template, see the [Getting Started with the Aloha Community Template for Salesforce Identity](#).

## Preview Your Community with Community Builder

Preview how your community appears in a desktop browser window and on mobile devices.


Community Builder's preview option lets you see how your community appears when it's live.

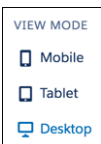
- To preview the community in a browser window, click **Preview** on the toolbar.



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



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



### SEE ALSO:

[Community Builder Overview](#)

[Publish Your Customizations with Community Builder](#)

[Implementation Guide: Using Templates to Build Communities](#)

### 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.

 **Important:** Publishing a Lightning community for the first time activates the community URL and enables login access for community members. The community doesn't have to be [active](#).

1. In Community Builder, [preview your community](#) to make sure that your updates appear as expected.
2. When you're happy with your changes, click **Publish** in the toolbar to publish your changes.

An email notification informs you when your changes go live.

SEE ALSO:

[Community Builder Overview](#)

[Preview Your Community with Community Builder](#)

[Implementation Guide: Using Templates to Build Communities](#)

### 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

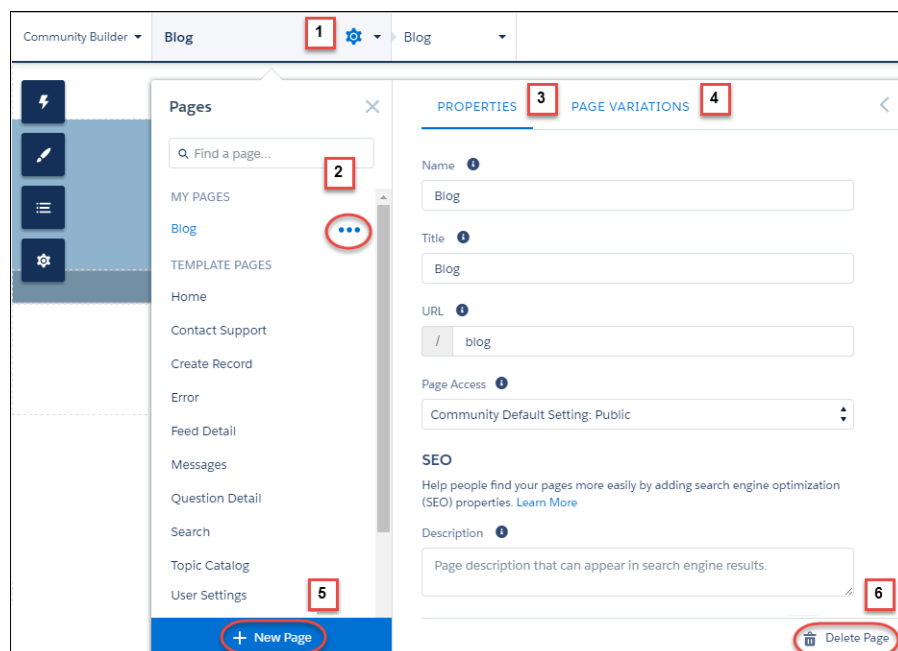
Available in: Salesforce Classic and Lightning Experience

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.

### Update Your Editor

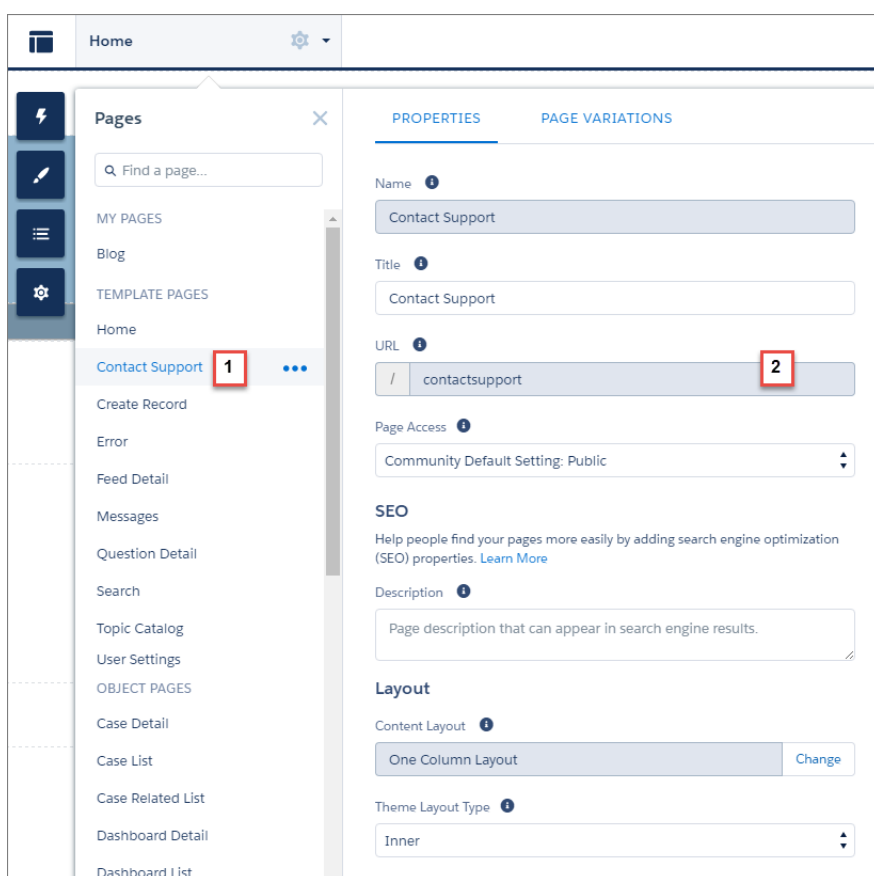
To improve how you edit your page content, we moved HTML editing to a dedicated HTML Editor component.

### Use Visualforce in Lightning Communities

If you have created Visualforce pages, actions, buttons, links, and canvas apps for your Salesforce Tabs + Visualforce template-based communities, you can reuse those elements in Lightning communities.

## 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.



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### 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 URL**

Lets you simultaneously change the URLs for all pages—record detail, list, and related list—associated with an object. Promotes consistency by ensuring all object pages share a common URL prefix. Editable only in custom object pages.

**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 SEO for Your Community](#)

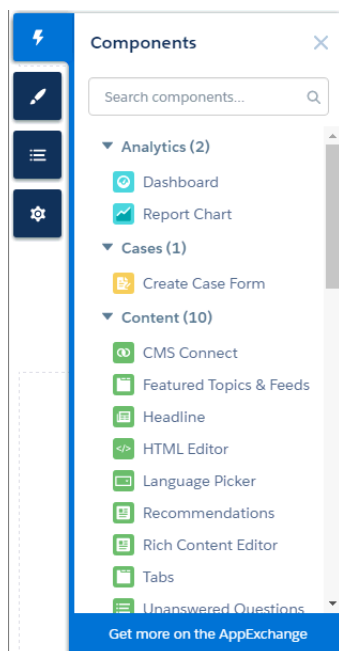
[Lightning Components Developer Guide: Create Custom Content Layout Components for Communities](#)

## Edit Community Pages and Components in Community Builder

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

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

1. From the Pages menu in the top toolbar, select the page that you want to edit.
2. Click  to open the Components panel.



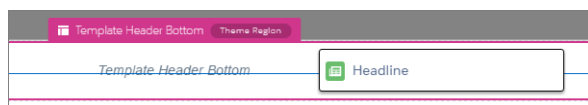
### USER PERMISSIONS

To customize or publish a community:


- Create and Set Up Communities

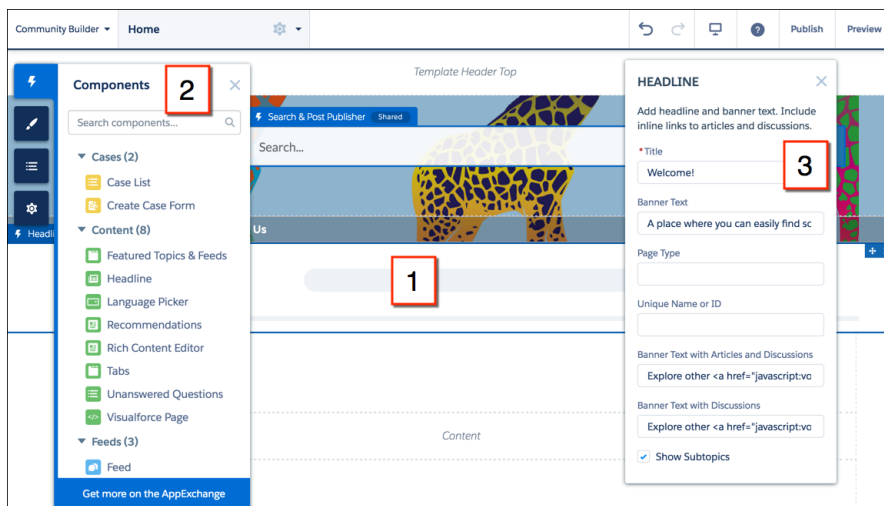
The Components panel lists only components that are compatible with the selected page. For example, you can't add the User Profile Detail component to the Home page.

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.

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

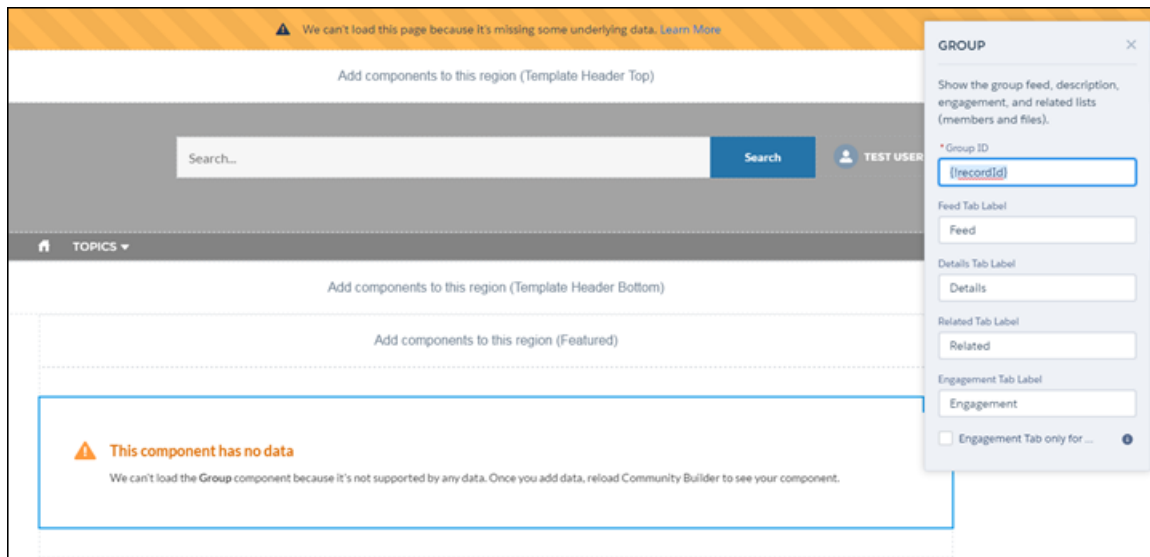
Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions

 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.

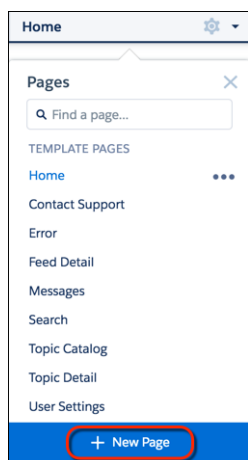
The following default pages in the Kokua template can show this error. Here are some tips on how to fix it.

- 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.



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.

### EDITIONS

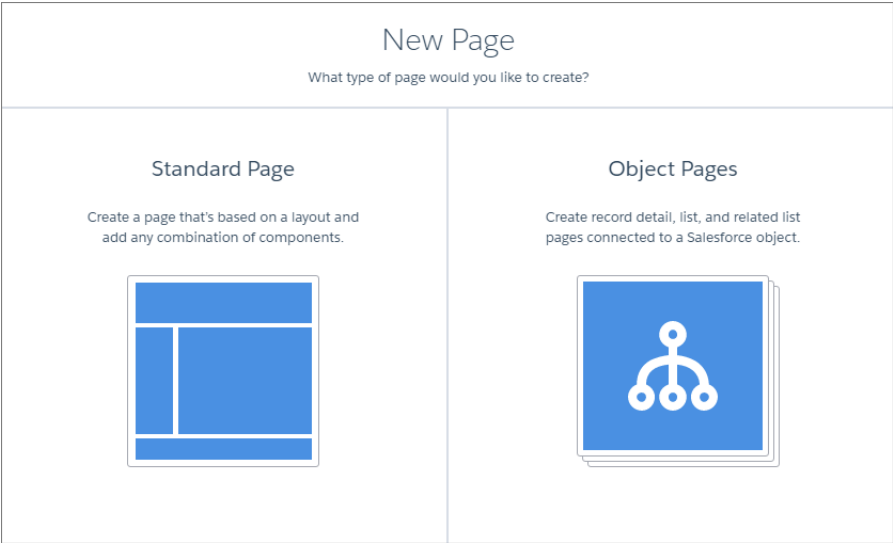
Available in: Salesforce Classic and Lightning Experience

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

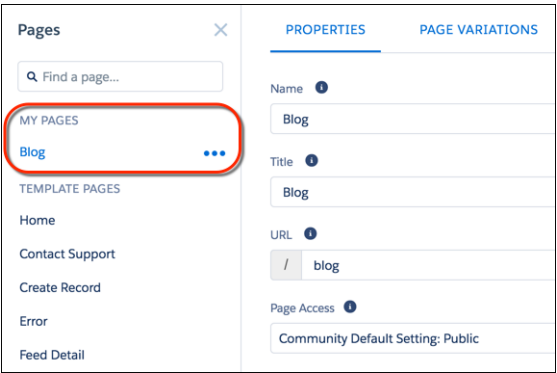
### USER PERMISSIONS

To create pages in Community Builder:

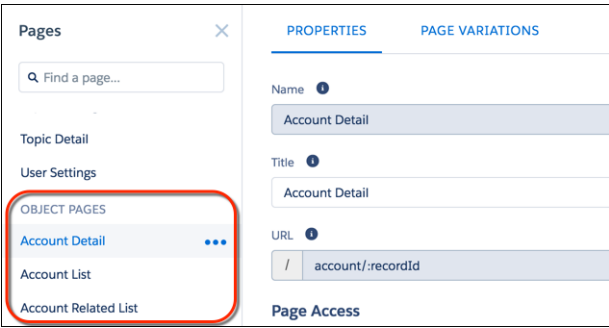
- Create and Manage Communities



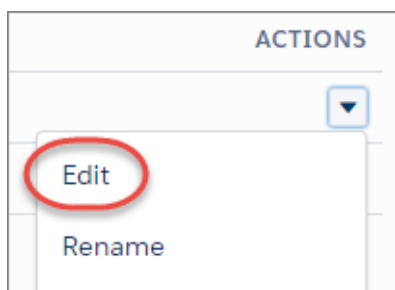
4. Click **Create**.  
Custom standard pages that are based on a layout appear under My Pages in the Pages menu. Pages that are based on a default template page appear under its Page Variations section.



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

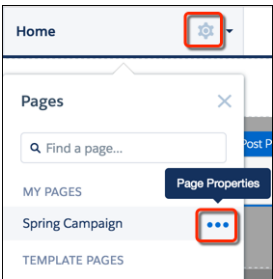
Available in: Salesforce Classic and Lightning Experience


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

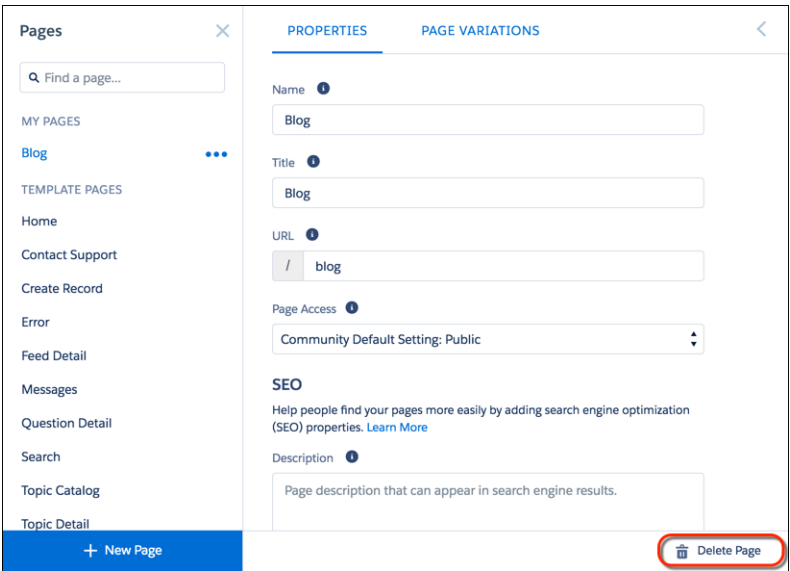
#### USER PERMISSIONS

To customize or publish a community:

- Create and Set Up Communities



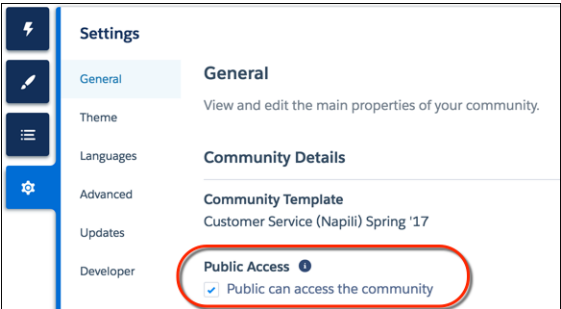
3. To delete the page and its page variations (if available), click **Delete Page** on the Properties tab. To delete a page variation, click  > **Delete** on the Page Variations tab.



## 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

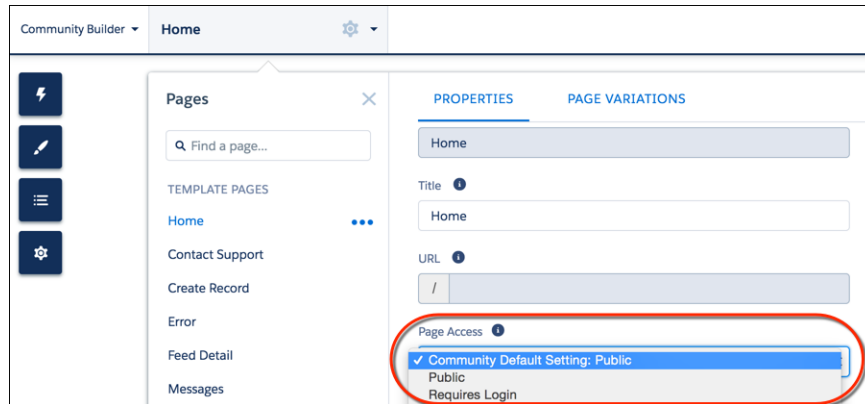
Reflects your choice for Public Access under General Settings. If you allow public access, your community pages are accessible to the public, including unlicensed users by default. If not, members must log in to access the community.

### Public

Makes the page public, regardless of the community's default setting.

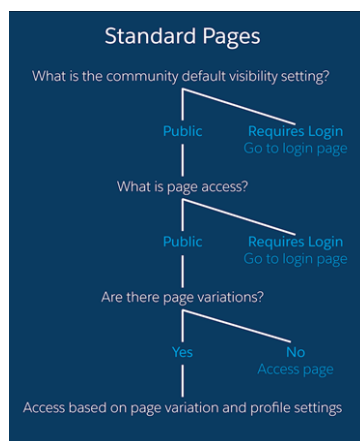
### Requires Login

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:** With the "Enable Stricter CSP for Lightning Components in Communities" critical update, you have control over whether to enforce stricter CSP. When stricter CSP is activated, some of your existing head markup may not work correctly. Test your markup in your sandbox or DE orgs first before activating in live orgs in a future release.

Allowed Tags	Allowed Attributes
<base>	href, target
<link>	as, charset, crossorigin, disabled, href, hreflang, id, import, integrity, media, rel, <sup>1</sup> relList, rev, sheet, sizes, target, title, type <sup>1</sup> For rel, allowed values are alternate, apple-touch-icon, apple-touch-icon-precomposed, apple-touch-startup-image, author, bookmark, external, help, icon, license, manifest, mask-icon, next, nofollow, noopener, norereferrer, 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 clear-type, content-type, content-language, and default-style.
<title>	None allowed

1.
- In Community Builder, click  on the left sidebar and click **Advanced**.

### EDITIONS

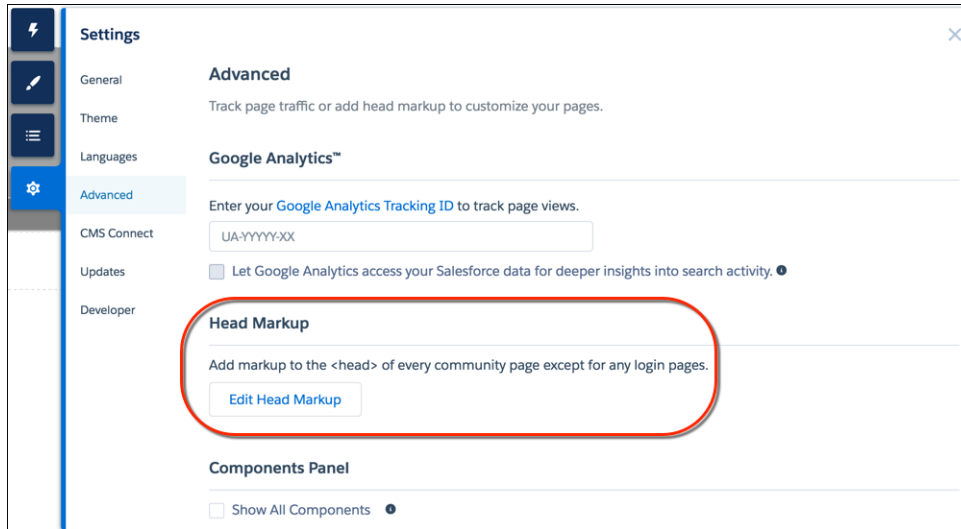
Available in: Salesforce Classic and Lightning Experience

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

### USER PERMISSIONS

To customize or publish a community:

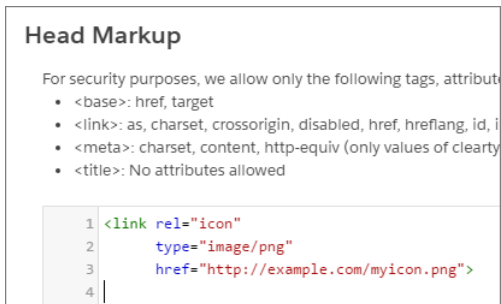
- Create and Set Up Communities



2. Click **Edit Head Markup**.
3. Enter the required HTML.
4. Save your changes.

When you add custom markup, the code is added to the `<head>` of every page except login pages.

 **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:

### [Considerations for Using Criteria-Based Audiences](#)

Criteria-Based Audiences are a great way to target specific members of your community with the right content. As you work with them, though, there are some things to consider.

### [Manage Audience Targeting for Pages and Groups in Communities](#)

Combine audience criteria to control which page is visible to your community members, creating a custom experience and even custom groups.

## Considerations for Using Criteria-Based Audiences

Criteria-Based Audiences are a great way to target specific members of your community with the right content. As you work with them, though, there are some things to consider.

General considerations:

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

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

- The profile criteria determines the navigation menu items. For example, if you turned off an item for a sales user profile, it's off regardless of any additional criteria.

Performance considerations:

- Keep your location criteria broad. If the location is unlikely to have much traffic, try using a larger geographic area. For example, instead of a city, use a state or even country.
- To increase the traffic to your page, combine audiences. Instead of having multiple audiences that differ only by the city, combine them into one and add each city to the location criteria.
- Limit audiences to significant differences. If there are minimal differences in pages, such as content of a component, use actions to dynamically vary the component content instead.

Location criteria considerations:

- Location is the user's IP location, which could potentially be located in a neighboring area.
- The location permission is not on by default in Developer Edition orgs. Contact Salesforce if you want to use this feature in that edition.
- Use of Google API is not permitted in some countries. Location criteria don't work for those areas.

Domain criteria considerations:

- Available domains are created in Salesforce Setup and associated with a community, using a custom URL.
- Domain criteria are not available in sandbox or Developer Edition orgs.

### EDITIONS

Available in: **Salesforce Classic** and **Lightning Experience**

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

## 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

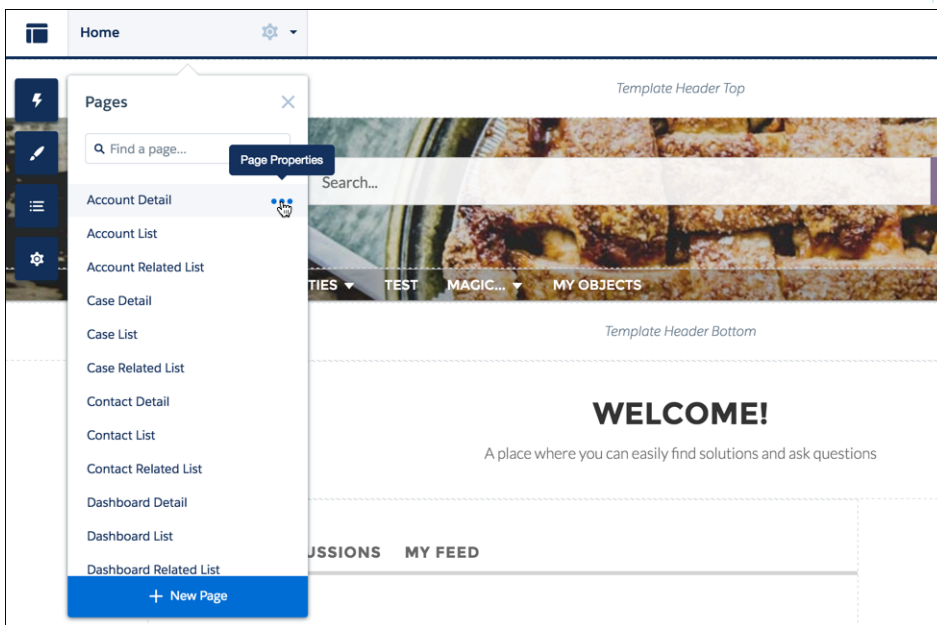
Available in: Salesforce Classic and Lightning Experience


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  > **Manage Audience**.
6. Select the criteria that you want for your audience.
7. To update the visibility settings of:
  - An unpublished page, click **Save**. The visibility changes don't go live until you publish your community.
  - A published page variation, click **Publish Visibility Changes**. The visibility changes go live immediately, but any other pending changes must be published separately.

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

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

## 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.



### EDITIONS

Available in: Salesforce Classic and Lightning Experience


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

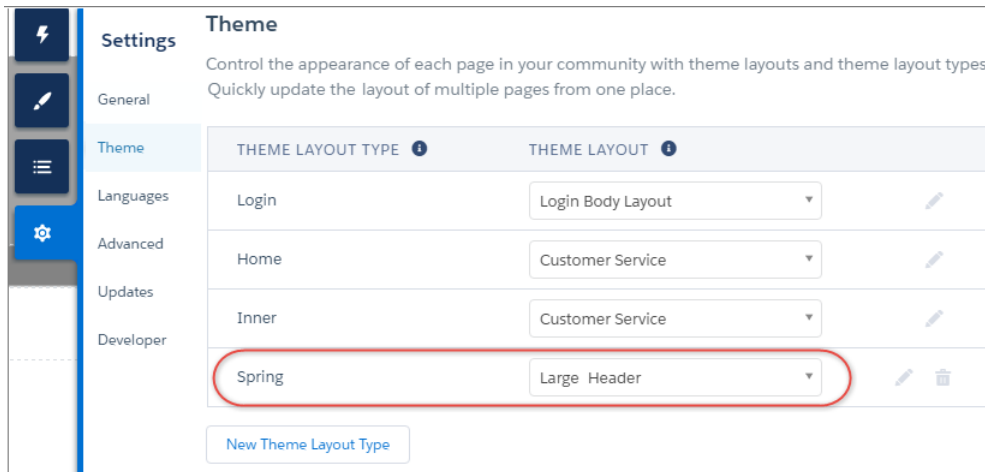
A theme layout type categorizes the pages in your community that share the same theme layout. You can assign a theme layout to an existing type or create custom types. Then you apply the theme layout type—and thereby the theme layout—in the page's properties. Customer Service (Napili) includes the following 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.

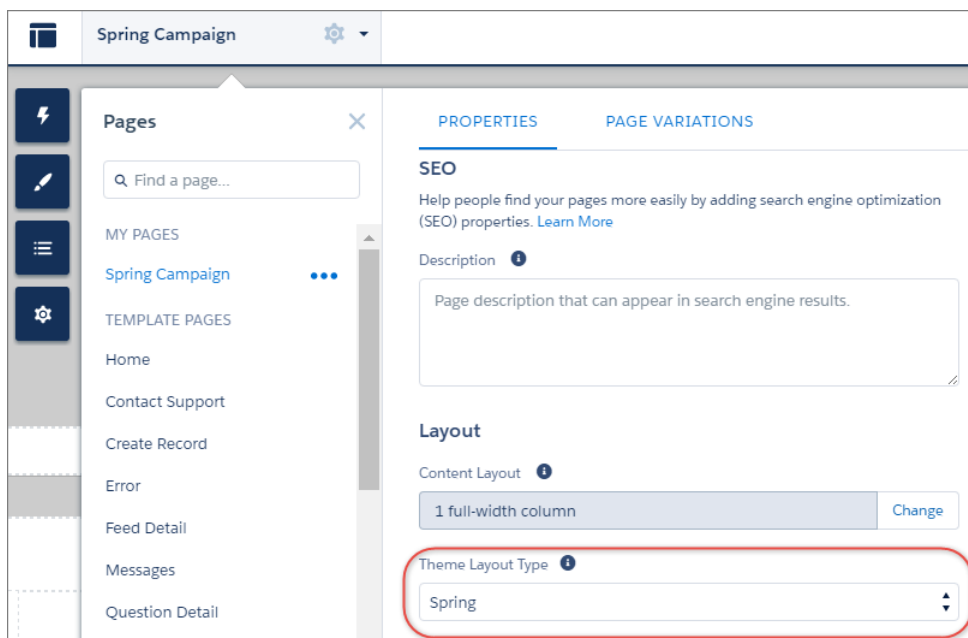


**Note:** A developer creates custom theme layout components in the Developer Console by implementing the `forceCommunity:themeLayout` interface.

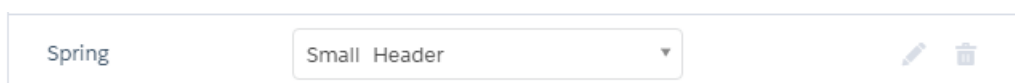
 **Example:** Let's say you create three pages for your upcoming Spring campaign. You want them to use the Large Header theme layout that your developer created. In the **Settings > Theme** area, you add a custom theme layout type called Spring to categorize these pages and assign the Large Header layout to it.




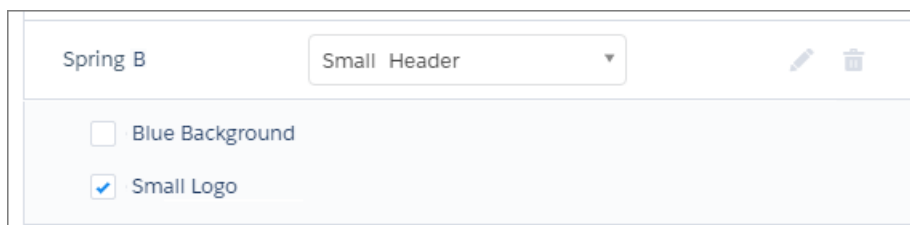
Next, you apply the Spring theme layout type in each page's properties, which instantly applies the Large Header layout to each page.



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

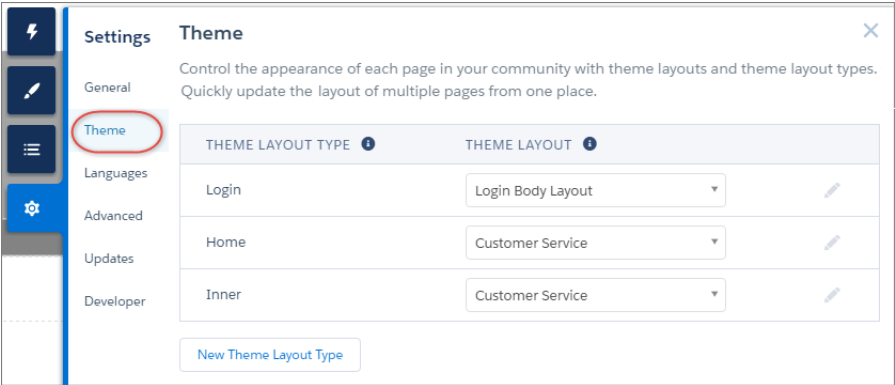
Available in: Salesforce Classic and Lightning Experience

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

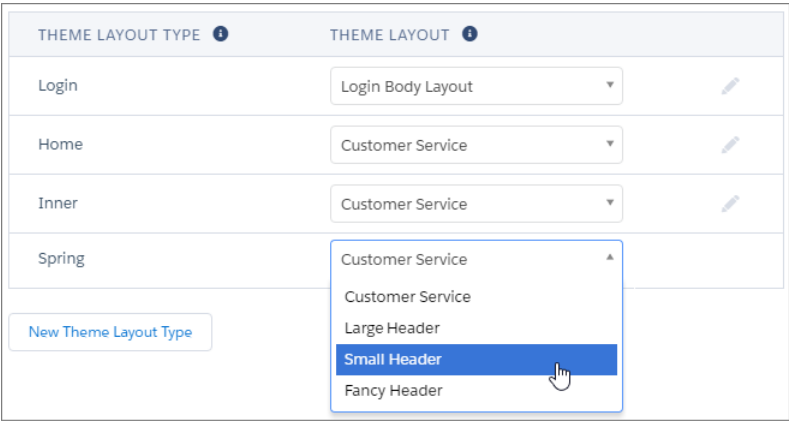
#### USER PERMISSIONS

To customize or publish a community:

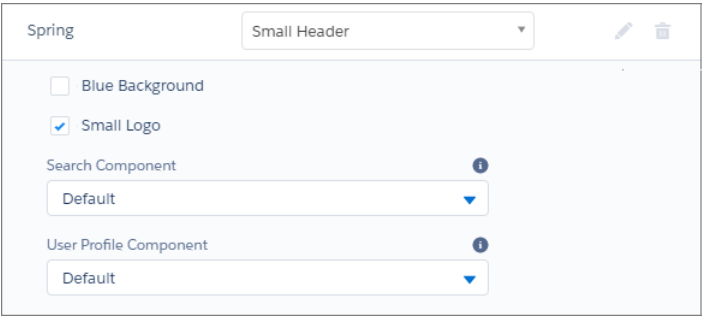
- Create and Set Up Communities



- 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**

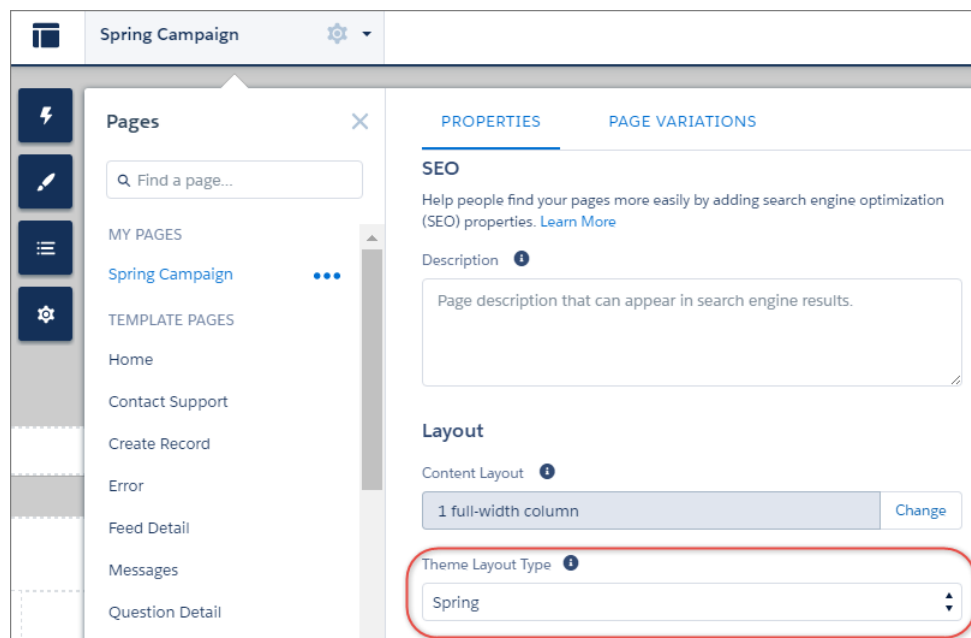
Replaces the default Search and Post component with a custom component, if available.

**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](#)

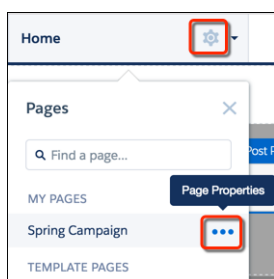
[Lightning Components Developer Guide: Create Custom Search and Profile Menu Components for Communities](#)

## Change the Content Layout in Community Builder

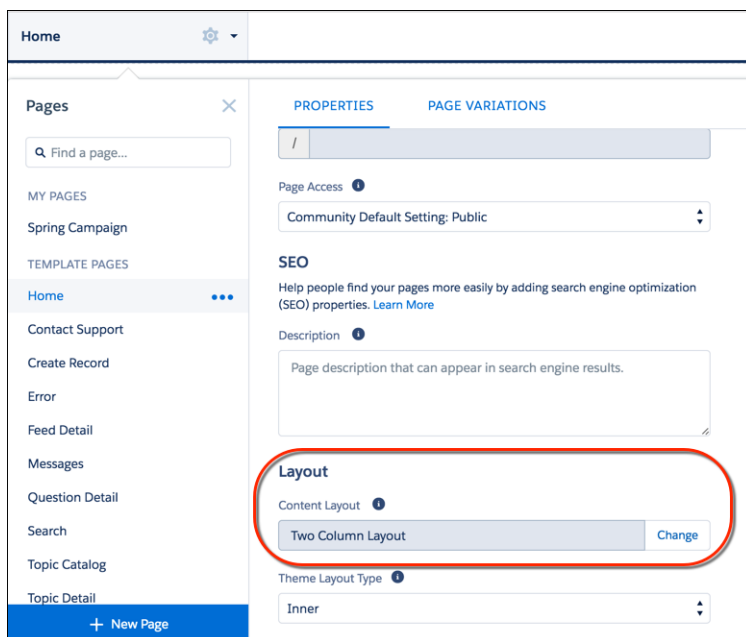
Quickly change the look of your community's pages by switching to a different layout. You can even create your own custom layouts in the Developer Console and import them to use in your community.

 **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.



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.

### EDITIONS

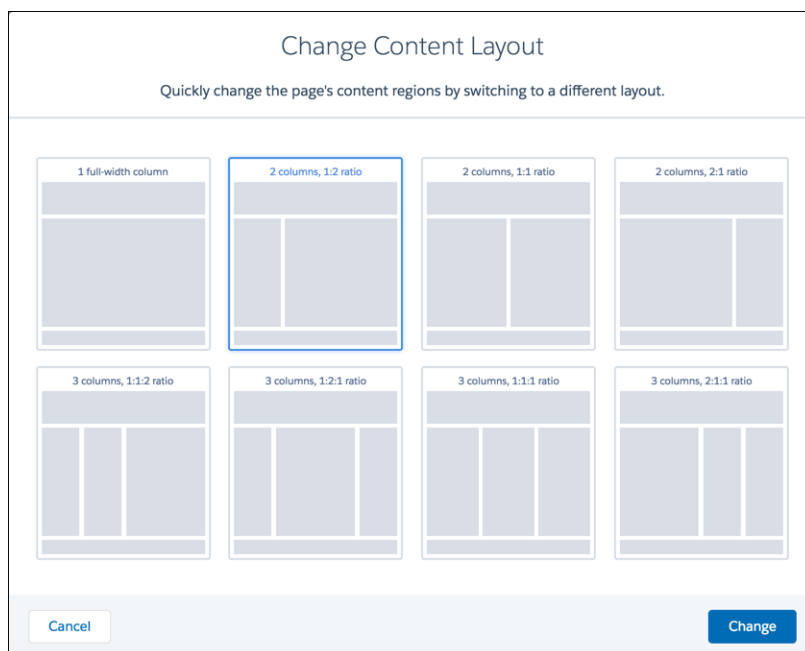
Available in: Salesforce Classic and Lightning Experience

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

### USER PERMISSIONS


To customize or publish a community:

- Create and Set Up Communities



#### 4. Click **Change**.

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

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

## Update Your Editor

To improve how you edit your page content, we moved HTML editing to a dedicated HTML Editor component.

There's no need to upgrade your existing Rich Content Editor components unless you want to edit the content. In that case, we prompt you to move the content to the appropriate new editor, either Rich Content or HTML. We position the new editor right below the original so it's easy to compare and adjust your content. When you're sure it looks good in the new editor, delete the old Rich Content Editor component.

Not sure which editor to choose? Try both! Compare the moved content to the original content in Preview and then delete the components you don't need. Your changes are not live until you publish your community.

1. Click any existing rich content editor on your page.
2. Choose an editor.

To create and edit simple rich content and quickly add links, images, and videos, use the updated Rich Content Editor component. No need to edit the HTML directly. There are new tools to underline and add background color to text. If you prefer more formatting control and are comfortable working with HTML, use the HTML Editor component instead.

Did you work with source code in the original Rich Content Editor component? If so, you probably want to move to the dedicated HTML Editor component. The moved content is more likely to display exactly like your original content.

### EDITIONS

Available in: Salesforce Classic and Lightning Experience


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

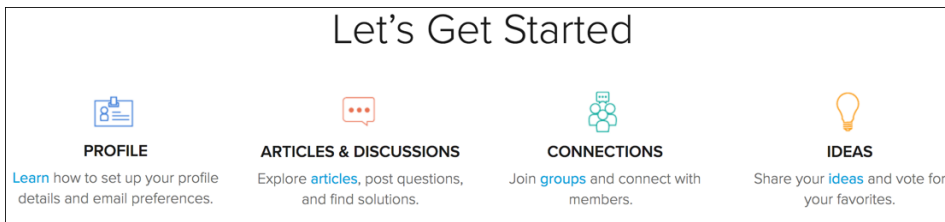
### USER PERMISSIONS

To customize or publish a community:

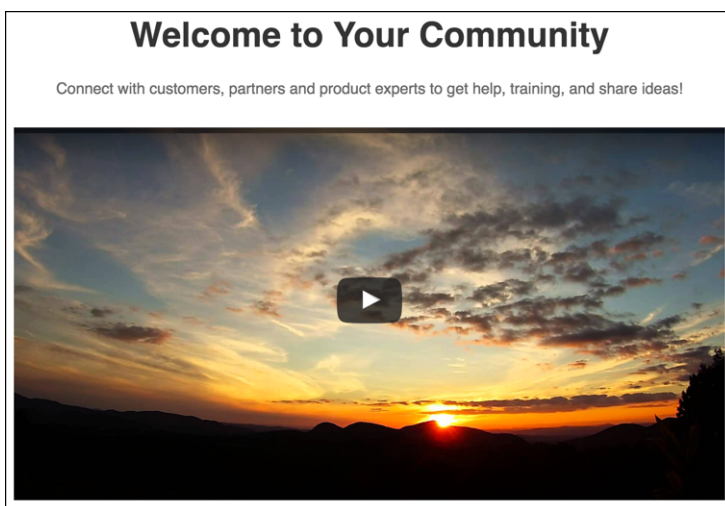
- Create and Set Up Communities

3. Check your content in the new editor. When you're happy that everything looks correct in the new component, delete the old one.

 **Example:** If you use multiple inline images and want control over alignment and text formatting, use the HTML Editor component.



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



## Use Visualforce in Lightning Communities

If you have created Visualforce pages, actions, buttons, links, and canvas apps for your Salesforce Tabs + Visualforce template-based communities, you can reuse those elements in Lightning communities.

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**.

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

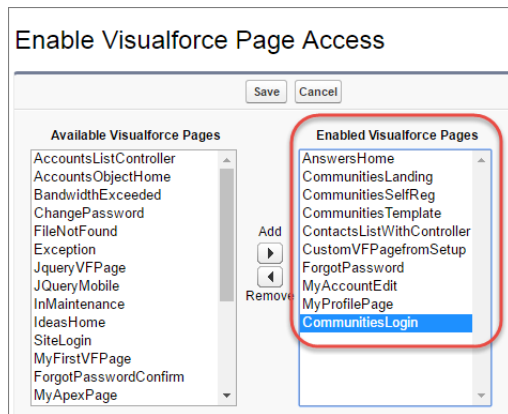
Available in: **Enterprise, Performance, Unlimited, and Developer** Editions

### USER PERMISSIONS

To customize or publish a community:

- Create and Set Up Communities

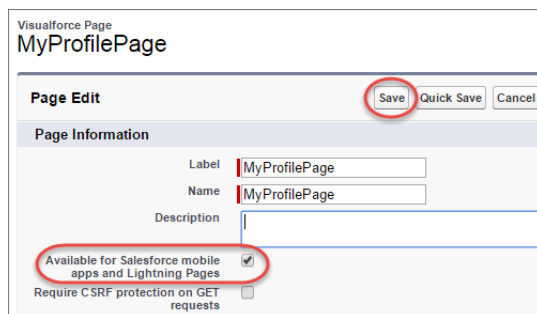
- e. In the Available Visualforce Pages list, select the Visualforce pages that you want to make available to this profile and then click **Add**.



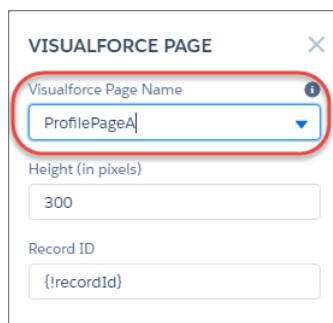
- f. Click **Save**.

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.

**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://` or `https://` at the start of the URL. Also, if your page is locked in a frame, use the `target="_top"` attribute to open the page in the full body of the window. For example,

```
<a href="https://yourVFpageURL.com" target="_top" >Name of Visualforce Page</a>
```

- **JavaScript Sources**—Use JavaScript sources such as `connection.js`, `apex.js`, `debugshell.js`, and `util.js` in Visualforce pages in either of the following ways:

```
<apex:includeScript value="/soap/ajax/36.0/connection.js"/> or  
loadScript("/soap/ajax/36.0/connection.js")
```

- **Images**—Hard-coded image URLs in Visualforce pages are not supported in Community Builder preview. We recommend that you upload images as static resources as follows:

```

```

## 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:

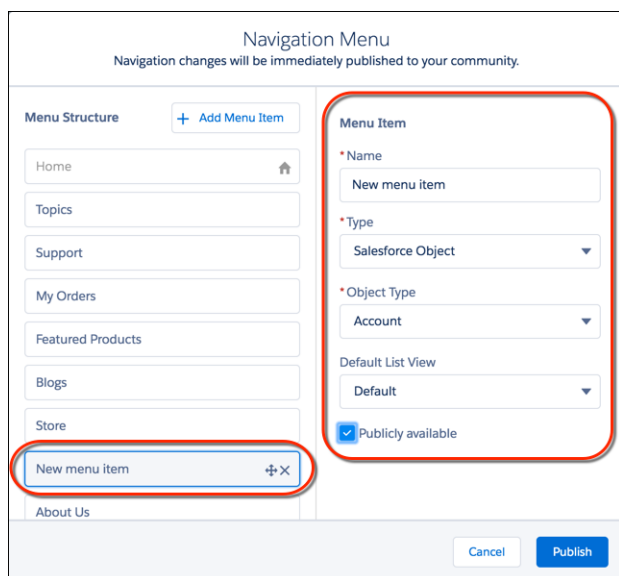
- Create and Manage Communities

## 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

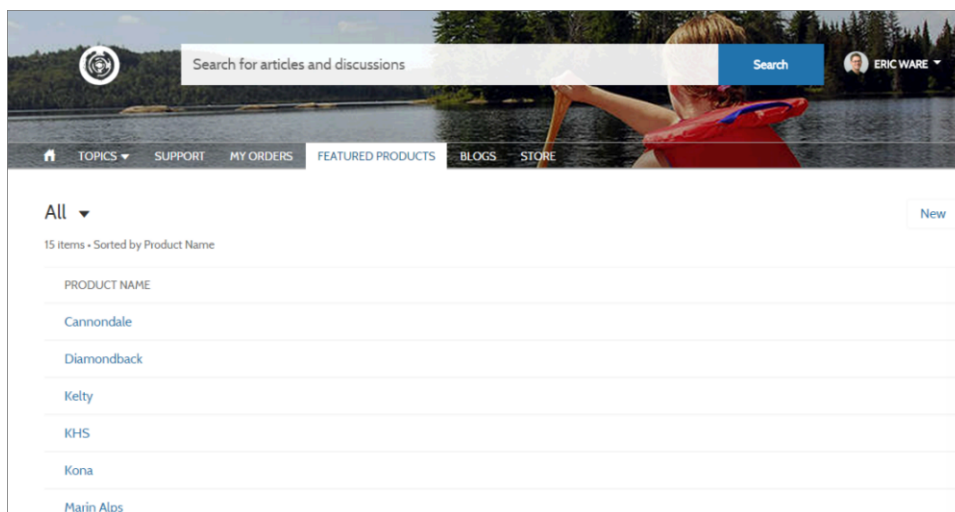
### 3. Publish your changes.

 **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.

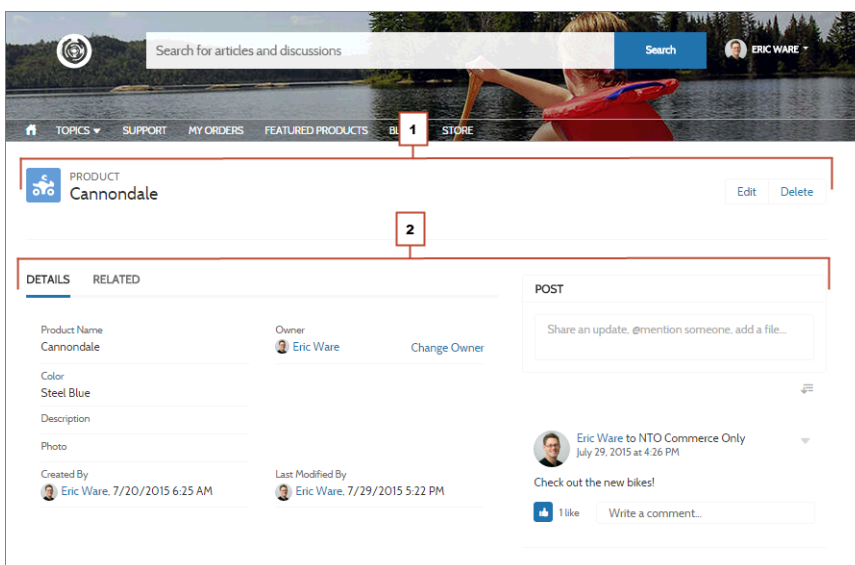
1. [Create a new Data Detail page](#) in Community Builder and pick a supported object.
2. Add the Record Headline and Record Information components to the page and configure the component properties in the property panel.
3. Publish your changes.



**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.

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

1. To enable groups in your community, add groups to the community navigation menu.  
This automatically displays a menu item that links to a list of groups in your community. If you make the menu item publicly available, even guest users who aren't logged in to your community can browse through the list of active public groups.

### 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

**Edit Navigation Menu**

+ Add Menu Item

Home

Topics

**GROUPS**

Name  
GROUPS

Type\*  
Salesforce Object

Object Type\*  
Group

Default List View  
Active Groups

☒ Publicly Available

Cancel **Publish Changes**

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:

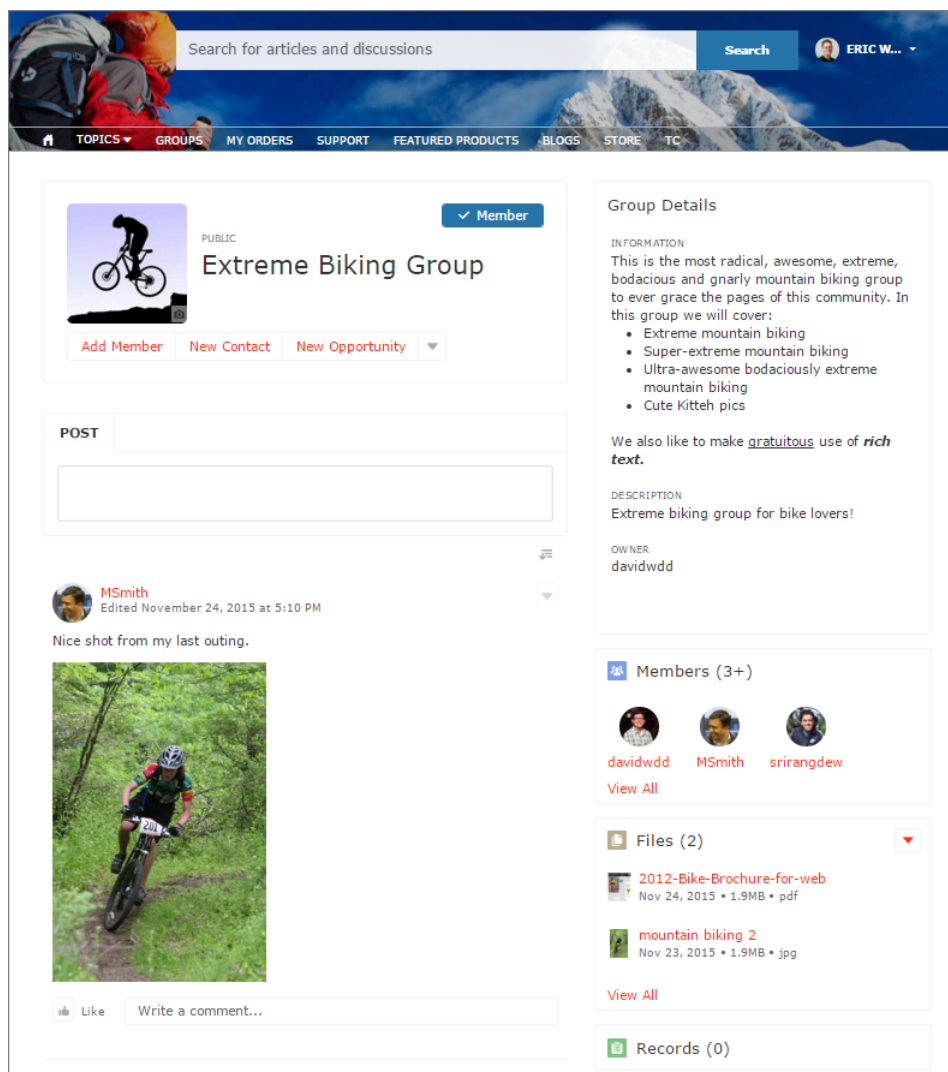
- When you enable groups in your community, the default Group Detail page is used to display group data. This page uses the Group component under the hood for formatting and layout. The Group component is a composite, one-stop component that includes the group banner, group details, related lists, and 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

The screenshot shows the 'Groups' section of a Salesforce Community. At the top, there is a search bar with the text 'Search for articles and discussions' and a 'Search' button. To the right of the search bar is a user profile for 'ERIC W...' with a dropdown arrow. Below the search bar is a navigation menu with links: HOME, TOPICS, GROUPS (highlighted), MY ORDERS, SUPPORT, FEATURED PRODUCTS, BLOGS, STORE, and TC. The main content area is titled 'GROUPS' and 'Active Groups' with a dropdown arrow. Below this, it says '4 items • Sorted by Name • Filtered by Archive • Last updated 12/08/2015 at 17:47:29'. A 'New' button is visible in the top right corner. A table lists the active groups with columns: NAME, LAST ACTIVITY, MEMBERS, TYPE, and NICKNAME.

NAME	LAST ACTIVITY	MEMBERS	TYPE	NICKNAME
 <a href="#">Backpacking</a>	8/7/2015 4:17 AM	3 Members	Public	srirangdew
 <a href="#">Extreme Biking Grou</a>	11/24/2015 5:10 PM	6 Members	Public	davidwdd
 <a href="#">The Fitness Club</a>	8/7/2015 4:34 AM	1 Member	Public	slicdfd
 <a href="#">Trekking</a>	8/7/2015 4:16 AM	9 Members	Public	Sether

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](#)

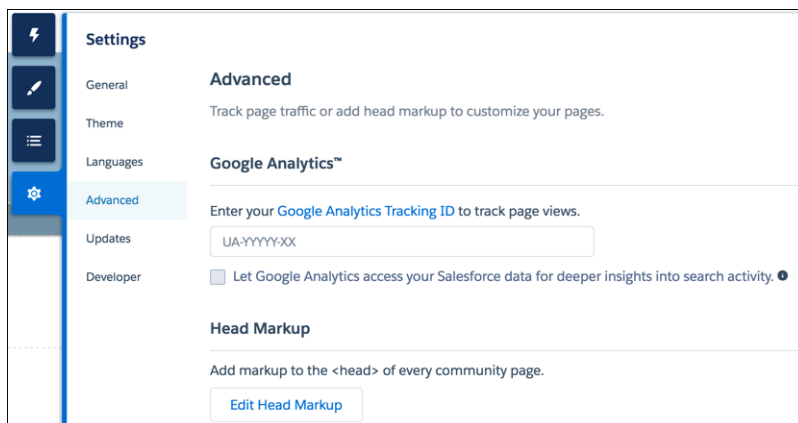
[Identity Type for External Data Sources](#)

## Track Community Users with Your Google Analytics Tracking ID

Add your Google Analytics™ tracking ID to track page views in your community. Enable access to your Salesforce data for deeper insights. Then, adjust your community's pages to more accurately reach your customers.

To track using Google Analytics:

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



3. To track user types, user IDs, and search activity, enable **Let Google Analytics access your Salesforce data for deeper insights into search activity**.
4. To enable the service, publish the community.

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

Once you've set up Google Analytics to integrate with your Salesforce community's data, you can either [create your own reports](#) or you can install the preconfigured [Google Analytics for Salesforce Communities package](#). For more information, see the [Google Analytics for Salesforce Communities](#) package write-up.

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

#### 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:

[Configure Google Analytics™ for Salesforce Communities](#)

Set up Google Analytics to track User IDs, community user types, and search activity so this information can be pulled into meaningful reports.

## SEE ALSO:

[Lightning Components Developer Guide: forceCommunity:analyticsInteraction](#)

## Configure Google Analytics™ for Salesforce Communities

Set up Google Analytics to track User IDs, community user types, and search activity so this information can be pulled into meaningful reports.

Google Analytics integrates with your self-service community to track user types, user IDs, pageviews on Salesforce objects, and customer search activity. To correctly capture this information, some initial setup is required.

1. First, let Google Analytics access your data to collect page views. Go to **Settings > Advanced** in Community Builder and enter your Google Analytics ID. For more information about the Google Analytics ID, check the [Google Analytics documentation](#).
2. Then select **Let Google Analytics access your Salesforce data for deeper insights into search activity** to allow Google Analytics to track user types, user IDs, and customer search activity within your community.
3. Create custom dimensions in your Google Analytics account that capture user type and Salesforce object information. From your Google Analytics account, go to **Admin > Property > Custom Definitions > Custom Dimensions**. Click **+New Custom Dimension**. The first dimension you create in your Google Analytics account is automatically sorted as Index 1.
  - a. For Index 1, enter the Name: *User Type* and select **Hit** for the scope.
  - b. For Index 2, enter the Name *Salesforce Object* and select **Hit** for the scope.
4. Create a User-ID view. With the User-ID view, you can analyze how specific segments of traffic with an assigned ID engage with your content. To create a User-ID view, go to **Admin > Property > Tracking Info > User-ID** and follow the instructions.
  - a. For the User-ID view, enter the Name: *User Explorer*.
5. To track how different types of users are interacting with the community, click **Reporting > Audience > User Explorer > User Flow**
6. Once you've set up Google Analytics to integrate with your Salesforce community's data, you can either [create your own reports](#) or you can install preconfigured [Google Analytics for Salesforce Communities package](#). Click [here](#) for more information about the Google Analytics for Salesforce Communities package.

### USER PERMISSIONS

To customize or publish a community:

- Create and Set Up Communities

## Analyze and Improve Community Performance (Developer Preview)

The Salesforce Community Page Optimizer analyzes your community and identifies issues that impact performance. Use the information to refine your design and improve community performance for your members. The Page Optimizer is a free plug-in available from the Chrome Web Store. Download and install the plug-in as you would any Chrome extension.

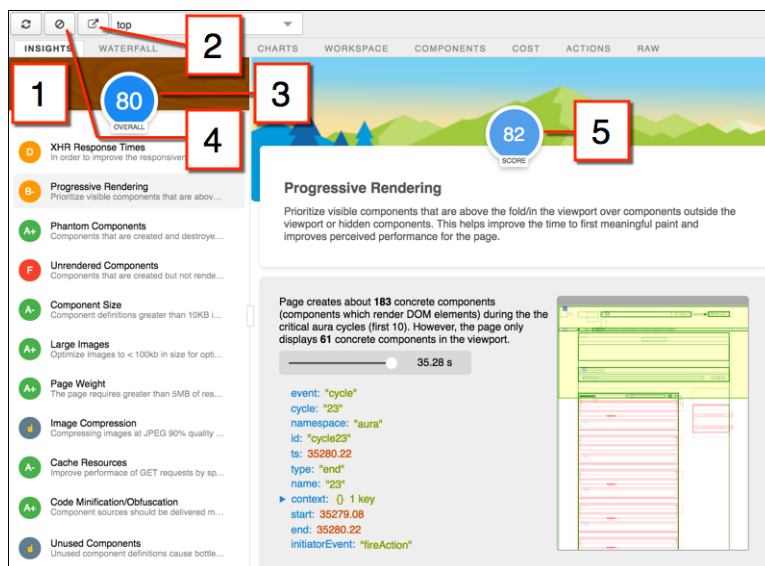
The Salesforce Community Page Optimizer is available as a developer preview. The Community Page Optimizer isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. All commands, parameters, and other features are subject to change or deprecation at any time, with or without notice. Don't implement functionality developed with these commands or tools.

The Community Page Optimizer is located with your other Chrome extensions.



## Insights

To analyze your community, navigate to your published community, load the page, and then launch the Community Page Optimizer.



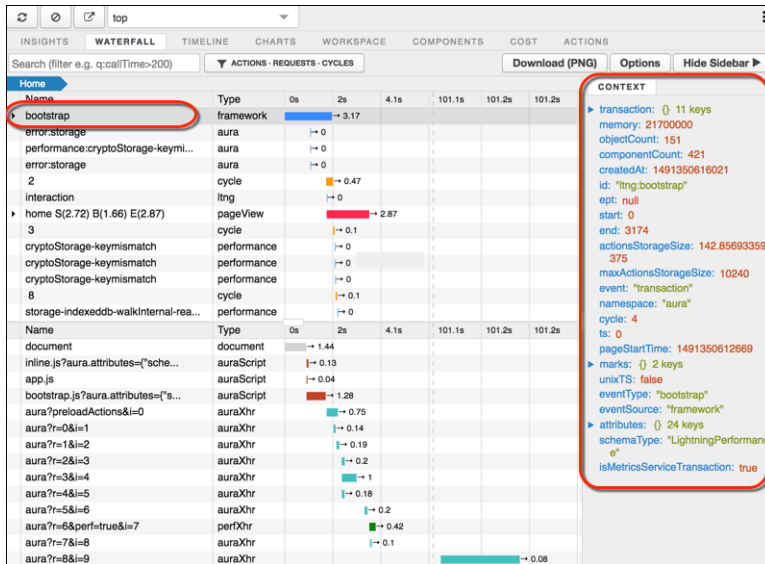
The Insights tab (1) evaluates your page based on best practices for web applications developed using the Lightning framework. This tab displays an overall performance score (3) along with individual scores (5) for various analysis rules. To view details and suggested actions, click each rule. Click **Popout** (2) for more room to work.

The Insights tab is conservative in providing recommendations. For further insights, consider reviewing the raw data presented on the Waterfall, Timeline, Charts, Cost, and Actions tabs.

Click **Clear** (4) to remove collected metrics. Perform some user actions on the page to collect new metrics and then reopen the Community Page Optimizer. For example, to gather performance metrics for liking a feed item, clear performance metrics, click Like, and reopen the Community Page Optimizer.

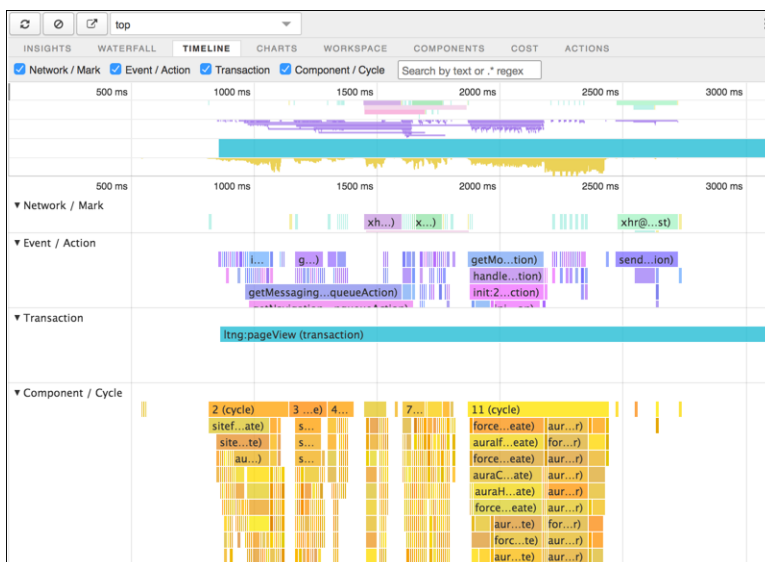
## Waterfall

The Waterfall tab displays all network requests and performance instrumentation data. Click a row to view contextual information in the sidebar. Click the arrow to the left of each row to expand the information for each row.



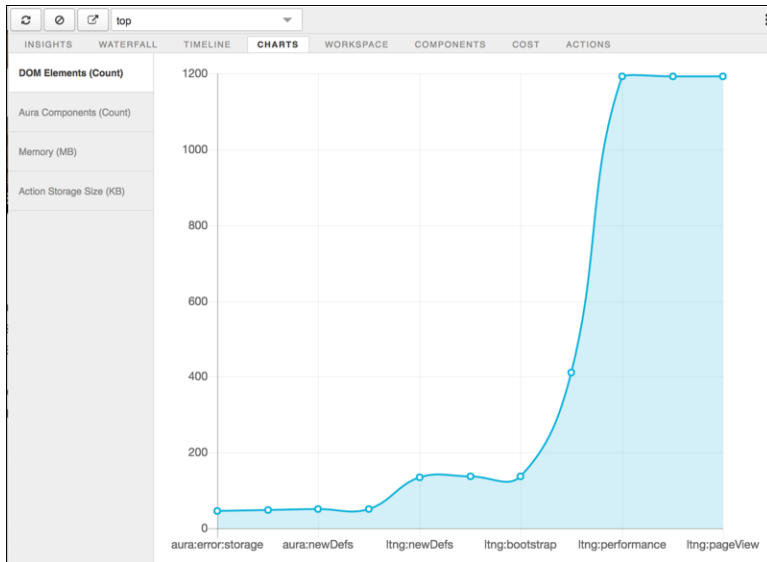
## Timeline

The Timeline tab provides a profile of each component's rendering life cycle. The timeline view is optimized for displaying Lightning framework metrics, so it's easier to interpret than Chrome DevTools.



## Charts

The Charts tab displays trending information about memory and components as customers use your page.



## Components

The Components tab displays the life cycle counts for each component on the page. This view helps you identify potential component leaks and unexpected rendering behavior. Use the Component tab along with the Cost tab for an overall view of component performance.

Pull Clear Export Import Popout Push Simple ▶							
INSIGHTS WATERFALL CHARTS COMPONENTS TIMELINE WORKSPACE COST ACTIONS RAW HELP							
<input checked="" type="checkbox"/> Enable <input checked="" type="checkbox"/> Cycles							
@current x Select head Take Snapshot							
x 1 x 2 x 3 x 5 x 8 x 9 x 10 x Select head cycle							
Search Options							
Id Name		Create	Render	Rerender	Unrender	AfterRender	Destroy
-	siteforce:napiApp	1	1	-	-	1	-
-	siteforce:baseApp	1	1	-	-	1	-
-	siteforce:routerInitializer	1	1	-	-	1	-
-	force:toastManager	1	1	-	-	1	-
-	force:toastMessageQueue	1	1	-	-	1	-
-	force:hoverPrototypeManager	1	1	-	-	1	-
-	one:actionsManager	1	1	-	-	1	-
-	force:targetInteractionHandler	1	1	-	-	1	-
-	siteforce:panelsContainer	1	1	-	-	1	-
-	siteforce:spinnerManager	1	1	-	-	1	-
-	siteforce:loadingBalls	2	2	-	-	2	-
-	siteforce:panelManager	1	1	-	-	1	-
-	one:panelManager	1	1	-	-	1	-
-	forceContent:filesManager	1	1	-	-	1	-
-	forceContent:modalPreviewManager	1	1	-	-	1	-
-	force:hostConfig	1	1	2	-	1	-
-	siteforce:qb	1	1	-	-	1	-
-	instrumentation:beacon	1	1	-	-	1	-
-	force:quickActionManager	1	1	-	-	1	-
-	notes:editPanelManager	1	1	-	-	1	-

## Cost

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

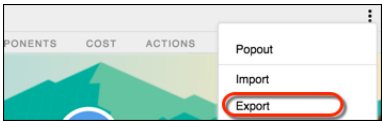
top						
INSIGHTS WATERFALL TIMELINE CHARTS WORKSPACE COMPONENTS COST ACTIONS						
Search Total Component JavaScript: 1327.28 ms						
Copy to clipboard Options						
Self Aggregate						
Name	Count	Average	Total	Average	Total	
siteforceNapiliApp	1	24.23ms	24.23ms 1.83%	303.6ms	303.6m	
siteforceBaseApp	1	0.92ms	0.92ms 0.07%	279.37ms	279.37m	
siteforceRouterInitializer	1	12.05ms	12.05ms 0.91%	12.71ms	12.71m	
auraComponent	372	0.48ms	84.59ms 6.37%	43.4ms (nested)	3,806.22ms (nested)	
uiAsyncComponentManager	1	1.37ms	1.37ms 0.10%	2.06ms	2.06ms	
uiContainerManager	1	2.85ms	2.85ms 0.21%	9.37ms	9.37ms	
auraHtml	684	0.8ms	232.07ms 17.48%	40.76ms (nested)	6,188.22ms (nested)	
forceToastManager	1	1.39ms	1.39ms 0.10%	12.11ms	12.11ms	
forceToastMessageQueue	1	4.84ms	4.84ms 0.36%	9.49ms	9.49ms	
auraAlteration	19	1.98ms	33.26ms 2.51%	41.88ms (nested)	666.32ms (nested)	
auraExpression	327	0.56ms	65.44ms 4.93%	45.46ms (nested)	1,813.92ms (nested)	
auraIf	340	0.73ms	175.6ms 13.23%	21.04ms (nested)	2,387.85ms (nested)	
forceHoverPrototypeMana...	1	5.34ms	5.34ms 0.40%	8.03ms	8.03ms	
forceHoverPrototype	1	1.95ms	1.95ms 0.15%	2.35ms	2.35ms	
oneActionsManager	1	2.11ms	2.11ms 0.16%	5.7ms	5.7ms	
forceTargetInteractionHand...	1	3.26ms	3.26ms 0.25%	3.44ms	3.44ms	
siteforcePanelsContainer	1	0.53ms	0.53ms 0.04%	10.07ms	10.07ms	
siteforceSpinnerManager	1	0.68ms	0.68ms 0.05%	3.5ms	3.5ms	
siteforceLoadingBalls	2	1.67ms	3.33ms 0.25%	3.47ms	6.94ms	
siteforcePanelManager	1	1.48ms	1.48ms 0.11%	5.75ms	5.75ms	
onePanelManager	1	2.66ms	2.66ms 0.20%	4.14ms	4.14ms	
uiPanelManager2	1	0.71ms	0.71ms 0.05%	1.48ms	1.48ms	
forceContentFilesManager	1	3.59ms	3.59ms 0.27%	8.01ms	8.01ms	

## Actions

The Actions tab displays a list of all actions performed on the page, along with their timing information.

## Export

Export your analysis to a file to share with your development and support teams.



## Submit Feedback

We want to hear from you. Share your comments, questions, requests, and any issues that you find. [Submit Feedback](#).

# Community Migration, Packaging, and Distribution

You can migrate your community between related orgs, such as your sandbox and production org, using change sets. And with managed packages, you can distribute customized Lightning Bolt solutions or pages to other Salesforce users and orgs, including people outside your company.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

## IN THIS SECTION:

[Migrate Your Community with Change Sets](#)

Use change sets to move your community between related orgs that have a deployment connection, such as your sandbox and production orgs. Create, customize, and test your community in your test environment and then migrate the community to production when testing is complete.

## Migrate Your Community with Change Sets

Use change sets to move your community between related orgs that have a deployment connection, such as your sandbox and production orgs. Create, customize, and test your community in your test environment and then migrate the community to production when testing is complete.

You can use change sets to move both Lightning communities and Salesforce Tabs + Visualforce communities.

1. Create and test your community in your preferred test org, such as sandbox.
2. From Setup in your test org, enter *Outbound Change Sets* in the Quick Find box, and then select **Outbound Change Sets**.
3. Create a change set, and click **Add** in the Change Set Components section.
4. Select the **Network** component type, choose your community, and then click **Add to Change Set**.
5. To add dependent items, click **View/Add Dependencies**. We recommend selecting all the dependencies listed.

**Tip:**

- For navigation menus that link to standard objects, custom list views aren't included as dependencies. Manually add the custom list view to your change list.
- The list of dependencies has two Site.com items—*MyCommunityName* and *MyCommunityName1*. *MyCommunityName* holds the various VisualForce pages that you can set for the [supported page settings](#) in Administration (in Workspaces or Community Management). *MyCommunityName1* includes the pages from Community Builder.

6. Click **Upload** and select your target org, such as production.

Make sure that the target org allows inbound connections. The inbound and outbound orgs must have a deployment connection.

7. In your target org, create a community (if one doesn't exist) with the same name and template version as the community in your source org.

For Communities, you can only make updates with change sets, which means that you can't create a community directly from an inbound change set.

8. From Setup, select **Inbound Change Sets** and find the change set that you uploaded from your source org.
9. Validate and deploy the change set to make it available in the target org.



**Warning:** When you deploy an inbound change set, it overwrites the community in the target org. So although you can't use a change set to delete a component, such as a community, you can delete the pages within the community. For example, let's say you delete pages from a community in sandbox and then create an updated outbound change set. When you redeploy the change set in a target org, such as production, the pages are also deleted there.

## 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

To edit deployment connections and use inbound change sets:

- Deploy Change Sets AND Modify All Data

To use outbound change sets:

- Create and Upload Change Sets, Create AppExchange Packages, AND Upload AppExchange Packages

10. Manually reconfigure the following items in your community.

- Most Administration settings
- Page variations and audience targeting
- Navigational and featured topics
- Languages
- List views for Navigation Menu items that link to objects



**Note:** Until you publish your community in the target org, Navigation Menu items that point to community pages appear to be broken. Similarly, settings for the change password, forgot password, home, and login pages each appear to return to their default values.


11. Add data for your community, and test it to make sure that everything works as expected. Then publish your changes to go live.

SEE ALSO:

[Considerations for Migrating Communities with Change Sets](#)

## Considerations for Migrating Communities with Change Sets

Keep the following considerations and limitations in mind when migrating your Lightning or Salesforce Tabs + Visualforce community with change sets.

- For Communities, you can only make updates with change sets, which means that you can't create a community directly from an inbound change set. Instead, in the target org, first create a community with the same name and template version, and then deploy the inbound change set.
- When you deploy an inbound change set, it overwrites the community in the target org. So although you can't use a change set to delete a component, such as a community, you can delete the pages within the community. For example, let's say you delete pages from a community in sandbox and then create an updated outbound change set. When you redeploy the change set in a target org, such as production, the pages are also deleted there.
- Navigation Menu items are supported. However, for menu items that link to objects, list views are reset to the default list view. Also, custom list views for standard objects aren't included as dependencies.
- If you [update the community template](#) in the source org to unify its branding properties, ensure that the template is also updated in the target org before deploying the change set.
- Only the following Administration settings in Workspaces or Community Management are supported.
  - Change password page
  - Forgot password page
  - Home page
  - Login page
  - **Allow internal users to log in directly to the community** option
-  **Note:** For communities created in a sandbox org before the Summer '17 release, you must resave these settings prior to migration to transfer them successfully. Similarly, reselect all images used in the Branding panel.
- The following items work only with published pages, so until you publish your community in the target org:
  - Navigation Menu items that point to community pages appear to be broken
  - Settings for the change password, forgot password, home, and login pages appear to return to their default values

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

- The following items aren't supported. Manually reconfigure them after you deploy the inbound change set.
  - Most Administration settings in Workspaces or Community Management (except for the settings already listed)
  - Page variations and audience targeting
  - Navigational and featured topics
  - Languages
  - Advanced settings in Community Builder, such as in Google Analytics

SEE ALSO:

[Migrate Your Community with Change Sets](#)

## Lightning Bolt Solutions: Build Once, Then Distribute and Reuse

With Lightning Bolt, you can create and export industry-specific solutions to jump-start new communities or package and distribute them for others to use. Save time by building once and 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

You can take advantage of Lightning Bolt in several ways to save time and money. Here are just a few examples.

- 👁 **Example:** Let's say you customize Customer Service (Napili) to create a branded community with features that meet your particular business needs. You want to create several similar communities, but you don't want to build each one from scratch. By exporting your customized solution, you can reuse it to build as many communities as you need.
- 👁 **Example:** You're a consulting partner who specializes in building communities for the real estate industry. With Lightning Bolt, you can build and export a real-estate-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:** Say you're an ISV who builds a custom page and several custom Lightning components 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.

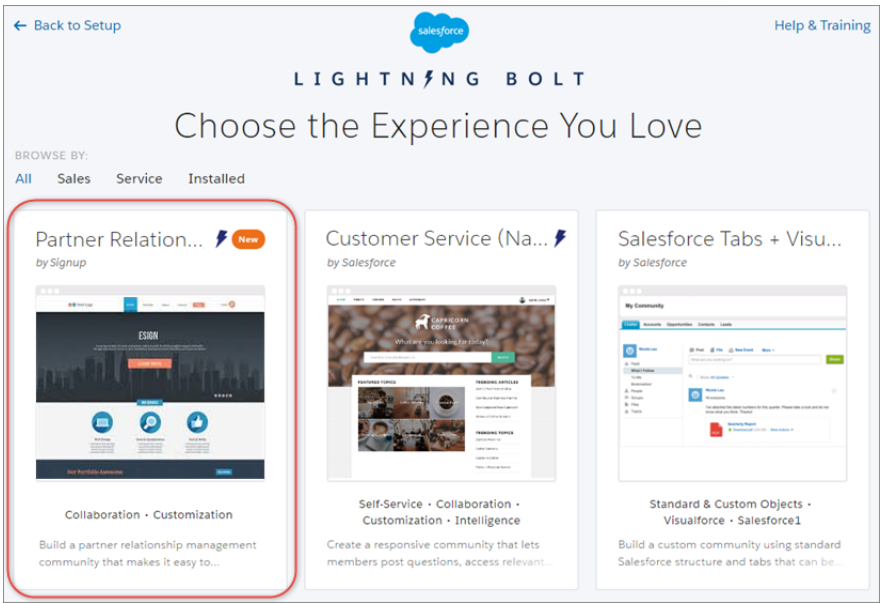
## What's a Lightning Bolt Solution?

At its simplest, a Lightning Bolt solution comprises a community template that's made up of a theme layout and CSS, along with pages, content layouts, and Lightning components. Lightning Bolt solutions seamlessly integrate with Salesforce and incorporate business logic, custom objects and apps, 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 finish customizing the template, export the template or one of its pages from **Settings > Developer** to make it ready to use or distribute.

## I Want to Reuse My Own Solution

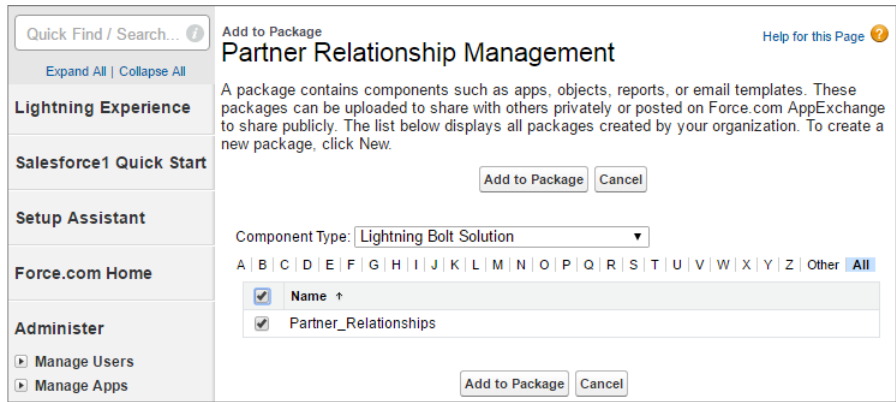
When you export a template, it appears in the Community Creation wizard in your org, where you can use it to build new communities.



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.

## I Want to Package and Distribute Solutions

You can package solutions for distribution to your customers’ orgs. After you create and upload a managed package, share the link privately with your clients, customers, or partners. Alternatively, publish your custom Lightning Bolt solution as a managed package to AppExchange. Market your solution with an AppExchange listing in the same way you list any other app, component, or consulting service. Describe your solution, pricing, support, and other details so that customers can determine whether your offering is right for them.



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

SEE ALSO:

[Salesforce Partner Community: Lightning Bolt for Partners](#)

[Lightning Component Developer Guide: Create Custom Theme Layout Components for Communities](#)

[ISVforce 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 available only 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 necessarily 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 individual login pages.

### Template Export and Packaging

- The exported template name must be unique.
- When you export a template, the system removes any non-alphanumeric characters from the template and page names. For example, *My Template #2* becomes *My\_Template\_2*.

- 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.
- For Navigation Menu items that link to objects, list views are reset to the default list view. Also, custom list views for standard objects aren't included as dependencies, although custom list views for custom objects are.
- Only the following Administration settings (in Workspaces or Community Management) are included.
  - Change password page
  - Forgot password page
  - Home page
  - Login page
  - **Allow internal users to log in directly to the community** option
- The following items are not included when you export a template. After you import the template and use it to create a community in the destination org, you must manually reconfigure these items.
  - Most Administration settings (except for the settings already listed).
  - Community Builder settings, including head markup and the Google Tracking ID.
  - Custom theme layouts that aren't in use. Only theme layouts that are selected in **Settings > Theme** are included.
  - Custom styles in the CSS editor.
  - Localized content for multilingual communities.
  - 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.
- If you upgrade a managed template package, existing communities that are based on the upgraded template aren't updated.

## SEE ALSO:

[Export Customized Lightning Bolt Solutions](#)

[Export Customized Lightning Bolt Pages](#)

[ISVforce Guide: Creating and Uploading a Managed Package](#)

## Requirements for Distributing Lightning Bolt Solutions

Whether you're a partner, ISV, or developer, keep these requirements in mind when distributing Lightning Bolt solutions to people outside your org.



**Note:** This functionality is available only in the Customer Service (Napili) template.

Before Salesforce can recognize a customized template as a Lightning Bolt solution that's ready for distribution on AppExchange, your solution must meet certain requirements.

Use this checklist to ensure that you have:

- ☐ Developed a solution using the Customer Service (Napili) template
- ☐ Included at least one custom Lightning component (API version 40.0 or later)
- ☐ Included at least one custom Theme Layout component with a unique visual design
- ☐ Tested with the "Stricter Content Security Policy for Lightning Components in Communities" critical update enabled
- ☐ Used the Salesforce Lightning CLI plug-in to test custom Lightning components

### EDITIONS


Available in: Salesforce Classic and Lightning Experience

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

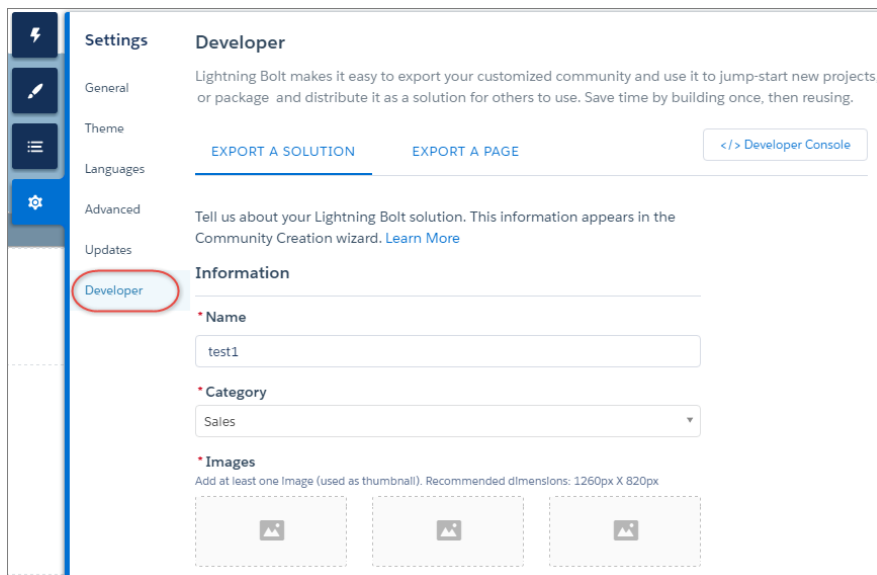
- ☐ Tested all community functionality and appearance across desktop, tablet, and mobile devices
- ☐ Ensured that your customizations have no regressions (each release)
- ☐ Verified that all third-party technology you use is approved by Salesforce
- ☐ Ensured proper code coverage, and executed basic performance testing
- ☐ Adhered to all Salesforce Lightning developer guidelines (such as attribute enforcements)
- ☐ Provided installation and configuration documentation
- ☐ Provided appropriate customer support for custom functionality

## Export Customized Lightning Bolt Solutions

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

 **Note:** You can't export a Lightning Bolt solution until you [update the template](#) to unify its branding properties.

- In Community Builder, select **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.
- Add a unique name for the solution and select a category.



- 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.
- Enter a summary that describes the purpose of the solution.
- 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.
- Click **Export**.

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

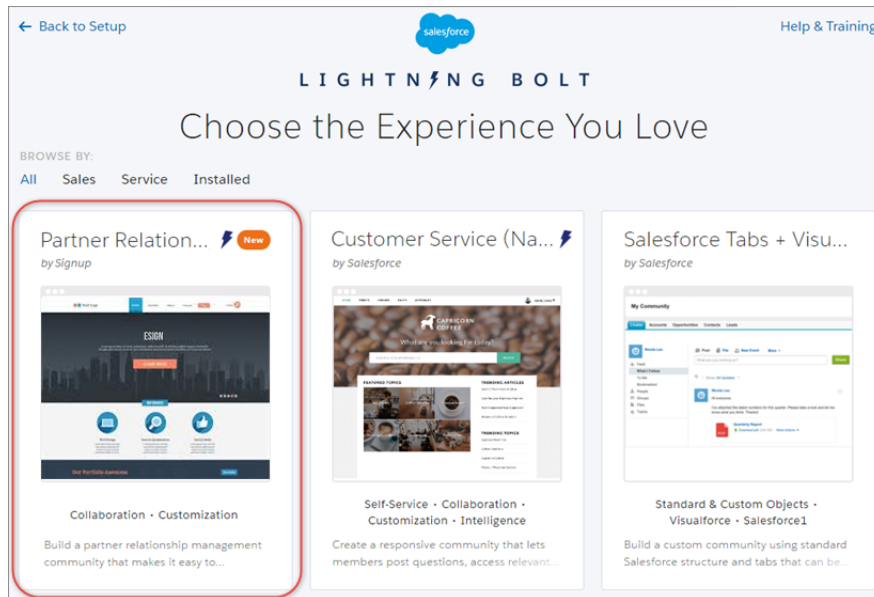
Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions

### USER PERMISSIONS

To customize or publish a community:

- Create and Set Up Communities

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.



- To distribute the Lightning Bolt solution for others to use, [create a managed package](#).

**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](#)

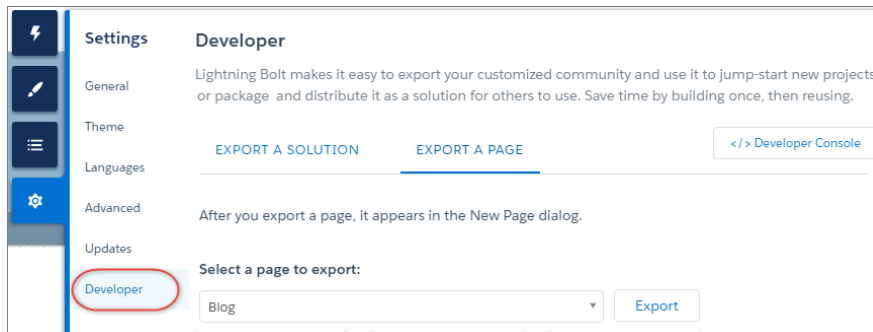
[ISVforce Guide: Creating and Uploading a Managed Package](#)

## Export 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, select **Settings > Developer** and click **Export a Page**.



### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

### USER PERMISSIONS

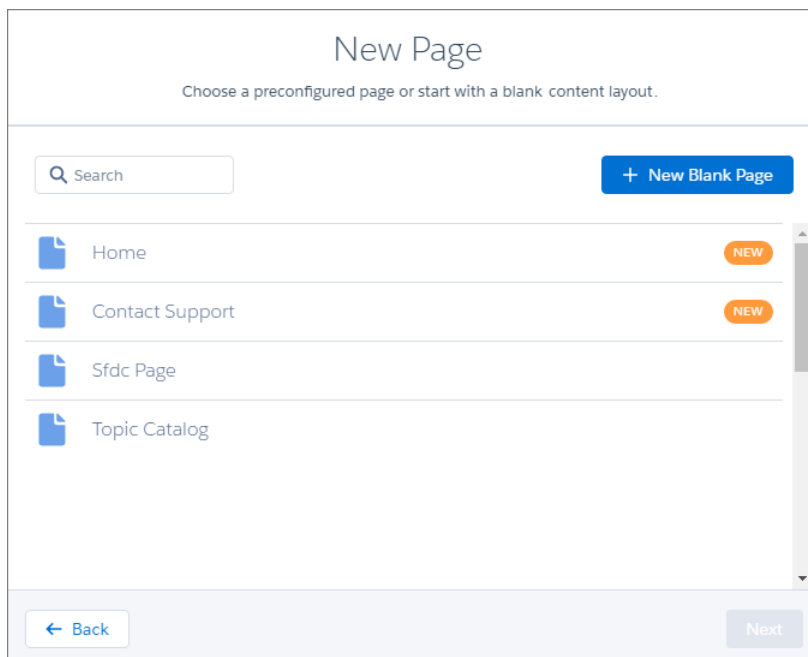
To customize or publish a community:

- Create and Set Up Communities


2. 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. To distribute your customized page for others to use, [create a managed package](#).

 **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](#)

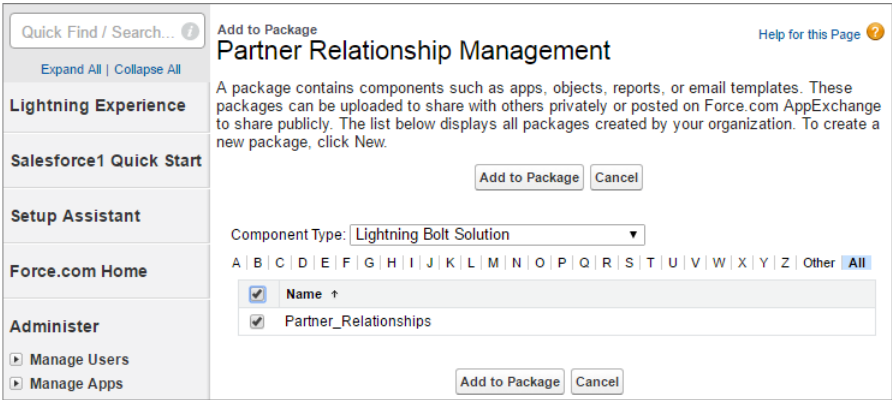
[ISVforce Guide: Creating and Uploading a Managed Package](#)

## Package and Distribute Lightning Bolt Solutions or Pages

After you export a Lightning Bolt solution or a page, you can create a managed package to distribute it to other users or orgs, including those outside your company. You can also upload solutions for distribution on AppExchange.

A package is a container for something as small as an individual component or as large as a set of related apps. Although packages come in two forms—unmanaged and managed—we recommend using only managed packages to avoid naming conflicts with other packages in your customer’s org or your own. To create a managed package, use a Developer Edition org.

1. From Setup, enter *Package* in the Quick Find box, and then click **Packages**.
2. To package an exported Lightning Bolt solution, select **Lightning Bolt Solution** as the component type and add your solution to the package. Alternatively, to package an exported page, select **Lightning Page** as the component type.  
All supported dependencies are automatically included.



3. Upload the package. Then distribute it on AppExchange, or share the link privately with your clients, customers, or partners.

SEE ALSO:

[ISVforce Guide: Overview of Packages](#)

[ISVforce Guide: Creating and Uploading a Managed Package](#)

[ISVforce Guide: Publish Your Offering on the AppExchange](#)

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To customize or publish a community:

- Create and Set Up Communities


To create and upload packages:

- Create AppExchange Packages AND Upload AppExchange Packages

## Connect Your Content Management System to Your Community (Beta)

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Do you have a website built in a Content Management System (CMS) such as Adobe Experience Manager? You can connect your CMS content to your community for consistent branding and ease of maintenance.

 **Note:** The Summer '17 release contains a beta version of CMS Connect, which means it's a high-quality feature with known limitations. CMS Connect isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available products and features.

### What is CMS Connect?

CMS Connect lets you embed assets from a third-party CMS such as Adobe Experience Manager (AEM) in your Salesforce community. You can connect CMS components, HTML, CSS, and JavaScript to customize your community and keep its branding consistent with your website.

After you do some initial configuration work, CMS Connect makes maintenance a breeze, because your content renders dynamically on your community pages. If you have website content in AEM, CMS Connect is the smart way to display headers, footers, banners, and other reused content in your community. We give you many configuration options including language mapping between your CMS and Salesforce, determining the load order of multiple connections, and specifying CSS scope.

 **Note:** In the Summer '17 release, Adobe Experience Manager is the only CMS we officially support. However, if your CMS server is WordPress or something else, CMS Connect can still work if you set it up properly. CMS Connect works with the HTML/CSS/HTTP standards and isn't AEM-specific, even though AEM is what's fully supported at this time.

#### IN THIS SECTION:

##### [Before Using CMS Connect](#)

Ready to get your CMS and your community connected? Before diving in, review these pointers and prerequisites so everything goes smoothly.

##### [Create a CMS Connection](#)

Create a connection between your Content Management System and your community so you can render headers, footers, banners, and other content on your community pages.

##### [Edit a CMS Connection](#)

You can edit a CMS connection that's already been set up in your community. For example, change the language mapping, or add CSS and JavaScript files.

##### [Change the Load Order of CMS Connections](#)

If your community has multiple CMS connections, you can decide the order in which they're loaded. This mostly affects any CSS and JavaScript in your connections. Consider their dependencies on each other, and set the load order accordingly.

### Before Using CMS Connect

Ready to get your CMS and your community connected? Before diving in, review these pointers and prerequisites so everything goes smoothly.

## Your HTTP server must serve HTML fragments

CMS Connect requires an HTTP server that can serve HTML fragments. Fragments can be static or rendered on demand. They might include headers, footers, components, CSS, or JavaScript.

## URLs must be absolute

All URLs in HTML fragments must be absolute and resolve uniquely to a fragment. Inside the fragments, image and all other URLs must start with HTTP.

## Some tags aren't allowed

CMS Connect filters out the same HTML tags that Locker Service and Lightning Components do. Get familiar with these now to avoid surprises later. See [Add Markup to the Page <head> to Customize Your Community](#) for a list of supported tags.

## All CMS servers must be accessible via HTTPS

All CMS servers you connect must be accessible via HTTPS to retrieve HTML and JavaScript. When you set up a CMS connection, the server URL you enter must start with HTTPS.

## All JavaScript must be from the same source as HTML

All JavaScript files referenced by your HTML must point to your AEM source.

## Community Workspaces must be enabled

To use CMS Connect, you must have [Community Workspaces](#) on page 13 enabled in your Community Settings. From Setup, go to Community Settings. Make sure the Enable Community Workspaces checkbox is selected.

## CMS Connect org perm must be left on


CMS Connect is controlled by an org permission that is turned on by default. If you're not seeing CMS Connect in your Community Workspaces, it's possible that the permission is turned off. You can ask Salesforce Customer Support to turn it back on for you.


## Create a CMS Connection

Create a connection between your Content Management System and your community so you can render headers, footers, banners, and other content on your community pages.

First, read [Before Using CMS Connect](#) to make sure you're ready to connect to your CMS.

1. Open [Community Workspaces](#) on page 15.
2. Click **CMS Connect**.
3. Click **New CMS Connection** (if no connections have been created yet in your community) or **New**.
4. In the Name field, enter a friendly name for the connection. The name shows up in your CMS workspace and other internal areas.
5. The API Name field populates by itself after you enter a Name, but you can change it if you want. Don't include spaces, but underscores are okay. This value is a unique identifier for referring to the connection in the API.
6. Select your CMS source. Choose AEM if your CMS server is AEM.

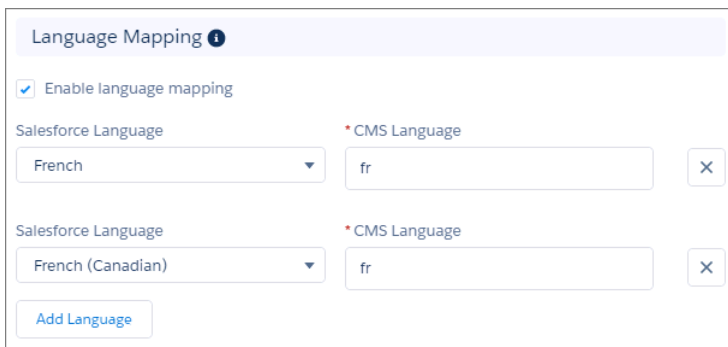
 **Note:** The “Other” option isn’t fully supported. However, if your CMS server is WordPress or something else, CMS Connect can still work if you set it up properly. CMS Connect works with the HTML/CSS/HTTP standards and isn’t AEM-specific, even though AEM is what’s fully supported at this time.

7. Enter your server URL. This is the full path to your CMS server, such as: `https://www.example.com`
8. In the Root Path field, enter the path to the HTML directory that your CMS content is in. You can include placeholders for language and component. For example, a root path to content in AEM might look like this: `content/mywebsite/{language}/{component}`
-  **Note:** The {language} placeholder isn’t required, but if you include it in your root path, you’ll need to enable language mapping and add at least one language.
9. To include CSS, click **Add CSS** to add one or more URLs to your CSS files. If your CSS is scoped, you can specify it in the Scope field. Stylesheets load in the order listed. Use the up and down arrows to change the order.
10. To include JavaScript, click **Add Script** to add one or more URLs to your JavaScript files. Scripts load in the order listed. Use the up and down arrows to change the order.
11. If your content has multiple languages, select the **Enable language mapping** checkbox.

In the Salesforce Language dropdown, English is selected by default. To map English, in the CMS Language field enter the directory name of your English language folder from AEM. For example, enter “en”.

To add more languages, click **Add Language**. For all languages you add from your CMS, make sure those languages are enabled in your Builder Settings.

If you want to map languages from your community that you don’t have in your CMS, you can do this to define what language the CMS content should display in. For example, your community has French and French Canadian enabled. You can set it up like this, so the French Canadian community displays French content:



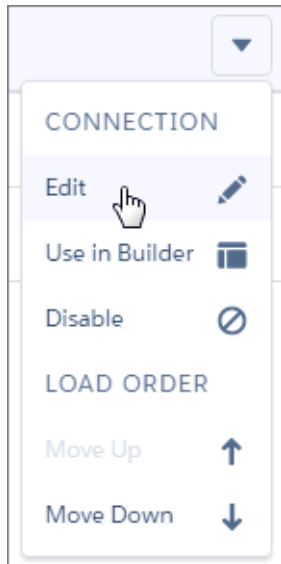
12. Click **Save**.

## Edit a CMS Connection

You can edit a CMS connection that’s already been set up in your community. For example, change the language mapping, or add CSS and JavaScript files.

1. Open [Community Workspaces](#) on page 15.
2. Click **CMS Connect**.
- 3.

Click  for the connection you want to edit. Choose **Edit**.




4. Make changes as needed. See [Create a CMS Connection](#) on page 307 for details.
5. Click **Save**.

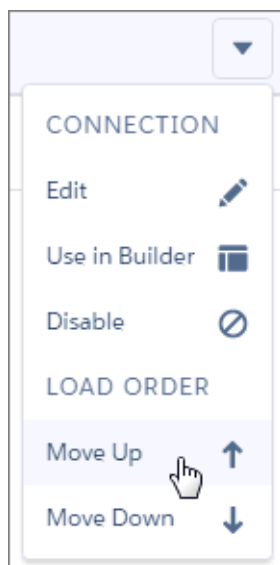
## Change the Load Order of CMS Connections

If your community has multiple CMS connections, you can decide the order in which they're loaded. This mostly affects any CSS and JavaScript in your connections. Consider their dependencies on each other, and set the load order accordingly.

For example, suppose one of your connections has the JavaScript library jquery, and another connection relies on jquery. Set the connection with jquery to load first so the other one will be able to load.

Header and footer always render first regardless of the load order of your connections.

1. Open [Community Workspaces](#) on page 15.
2. Click **CMS Connect**.
3. Click  for the connection you want to re-order.
4. Choose **Move Up** or **Move Down**.



## 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 Customer Communities with Topics](#)

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

#### [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.

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

[Reputation Overview](#)

Your reputation in the community directly corresponds to how active you are. The more you post, comment, and share, the higher your reputation level will be.

## Community Managers, Moderators, and Admins Working Together

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

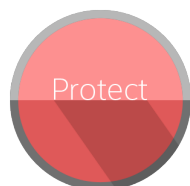
A community manager and moderator work hand-in-hand. They are partners and support one another in fostering engagement and harmony in the community. Sometimes, they perform some of the same tasks, but each has unique contributions. While the community manager is typically responsible for monitoring adoption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

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

### EDITIONS

Available in: Salesforce Classic 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.

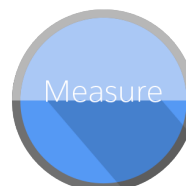


Welcome new members, add contributors, and connect members with resources.

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.

**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 directly from Community Management or from the Moderation workspace in Community Workspaces.

[Insights are set up by the administrator](#). If the Engagement section doesn't appear, the administrator hasn't mapped any Insights for your community.

### Dashboards

View dashboards and monitor information about groups, members, feed activity, moderation, topics, and license usage for this community.

[Dashboards are set up by the administrator](#). If the Dashboards section doesn't appear, the administrator hasn't mapped any dashboards for your community.

### Moderation

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

[Moderation is set up by the administrator](#).

### Topics

Create a navigation menu and showcase popular topics in your community.

[Navigational topics](#) and [featured topics](#) are set up by the administrator or in the case of self-service templates, they are enabled by default. If the Topics section doesn't appear, your community is not using topics.

### Recommendations

Recommendations can help drive engagement in a community. They can be set up to encourage users to watch videos, take trainings, and more.

[Recommendations are set up by the administrator](#). If the Recommendations section doesn't appear, the administrator hasn't set up any.

### Reputation

Set up reputation levels and points to reward members for activity in the community feed.

### 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


[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 Salesforce1. Tab settings aren't used if your community was created with one of the Self-Service templates.
- [Branding](#)—Select an out-of-box branding theme. This branding is only used if your community uses the Salesforce tabs + Visualforce template.
- [Login & Registration](#)—Select the default community login page and set up self-registration.
- [Emails](#)—You can customize email sender information, Chatter email branding, and templates in your community emails.
- [Pages](#)—Configure page assignments for your community and access the Force.com and Site.com settings for your community.
- [Preferences](#)—Update important settings such as flagging content, nickname display, public access to Chatter, and file limits.
- [Settings](#)—Edit your community name, description, and URL. You can also manage the status of your community and 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.

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.

### EDITIONS

Available in: Salesforce  
Classic and Lightning  
Experience

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

## 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 or Community Workspaces.



**Note:** Go to **Communities Settings** to enable Community Workspaces.

1. From Setup, enter *Permission Sets* in the *Quick Find* box, then select **Permission Sets**, then click **New**.
2. Create a permission set that includes the “Manage Communities” permissions.
3. From Setup, enter *Users* in the *Quick Find* box, then select **Users**.
4. Find the user you want to be a community manager and add the permission set to their Permission Set Assignments related list.

The user can now manage the community through Community Management or 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

## 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	✓		✓
Delete a post or comment	✓		✓
Remove flags on a file		✓	✓
Delete a file		✓	✓

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

## Assign a Community Moderator

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

Moderators can be users from your internal organization or external users, but only internal users can moderate from within Community Management 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 Management and Community Workspaces

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.

### 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

- 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.

#### [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 CommunityDashboards.](#)

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.

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

## 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 Workspaces Home 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 Workspaces Home page.
4. Click **Save**.

Dashboards are visible to community managers when they expand the Dashboards section or visit the Home page in Community Management 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 CommunityDashboards](#).

### 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
- Is a member of the community

## 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 Community Dashboards.

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.

Use Engagement to view, monitor, and act on your community's activity. Insights give you a detailed look at a specific area of your community.

Use Dashboards to view your community's metrics, such as trends on activity. Dashboards give you mid-term to long-term views on adoption and engagement in your community. They help you

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

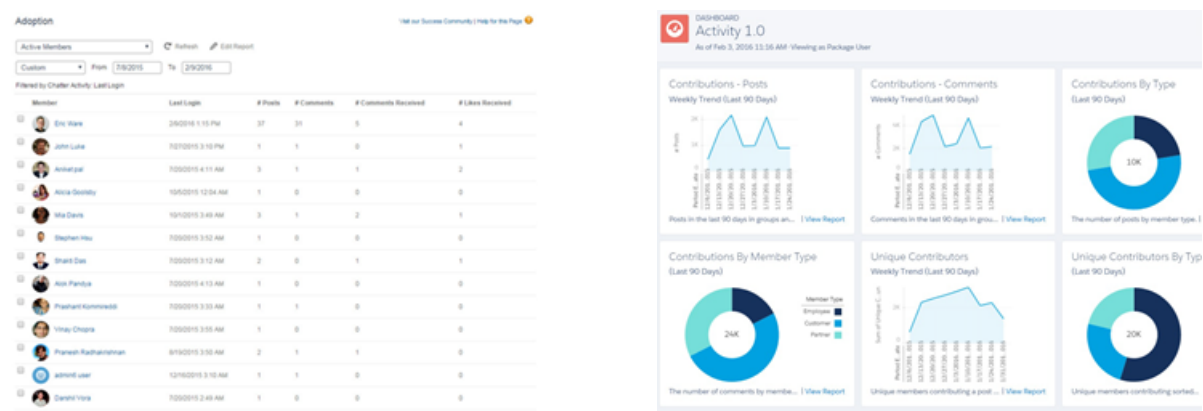
Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions

### USER PERMISSIONS

To view dashboards:

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

monitor return on investment (ROI) and key performance indicators (KPI).



For example, you can visit the **Engagement > Adoption** page to view a report about new members in your community that have received the most likes on their posts and comments. This Insights report helps you identify and engage with your active new members that are receiving positive feedback from other community members.

For example, you can visit the **Dashboards > Activity** page to track total posts and comments including overall contribution trends in your community.

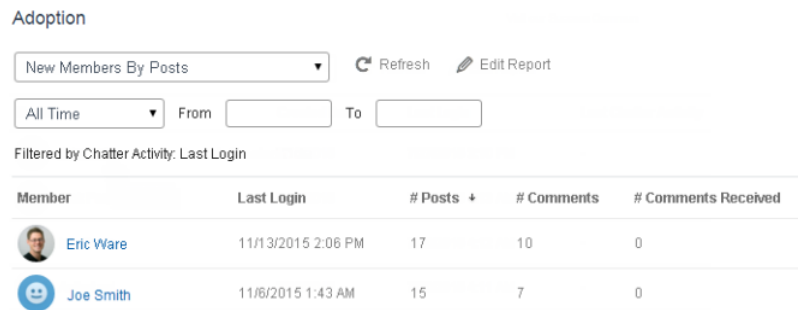
SEE ALSO:

- [View and Customize Insights for Your Community](#)
- [View CommunityDashboards.](#)

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

They can also access other reports about members directly from the Insights page using the drop-down menu.

Adoption

New Members

- New Members
- Recent Contributors
- Recent Logins
- Top Active Members By Comments
- Top Active Members By Comments Received
- Top Active Members By Influence
- Top Active Members By Likes Received
- Top Active Members By Posts
- Top Contributors Inactive For 7+ Days
- 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
- Top New Members By Posts
- Top New Members By Total Contributions

Refresh Edit Report

	Date	Last Login	Last Chatter Activity
5	7/27/2015 3:10 PM	-	
5	7/20/2015 4:13 AM	-	
5	7/20/2015 4:12 AM	-	
5	7/20/2015 4:11 AM	-	
5	7/20/2015 4:01 AM	-	
Jeffrey Freschi	7/20/2015	7/20/2015 3:59 AM	-
Sridhar Nelloru	7/20/2015	7/20/2015 3:57 AM	-

 **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, 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, 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 **Engagement > Settings**. If you are using Community Workspaces, click **Engagement > Settings** from the Dashboard workspace.
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 in the Moderation workspace of 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
- Is a member of the community


## 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, 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++) {
                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++) {
                if (!deleteResult.get(i).isSuccess()) {
                    for(Database.Error error : deleteResult.get(i).getErrors()) {
                        resultMap.put(string.valueOf(feedComments.get(i).CreatedById),
failure);
                    }
                }
            }
        }
    }

    private Integer calculateFailureCount() {
        Integer failureCount = 0;
        for (String result : resultMap.values()) {
            if (failure == result) {
                failureCount++;
            }
        }
        return failureCount;
    }
}

```

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

**Note:**

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

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

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

## SEE ALSO:

[Salesforce Help: Visualforce Pages as Global Custom Actions](#)

[Visualforce Developer Guide: Standard Controllers](#)

[Visualforce Developer Guide: Standard List Controllers](#)

[Visualforce Developer Guide: Building a Controller Extension](#)

## View and Customize Insights 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**.

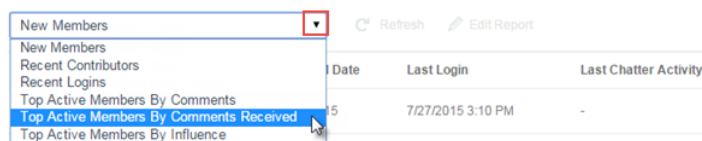
**Important:** Some Insights actions require special permissions. If you can't perform an action, let your admin know.

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  to open the Edit Insights Actions page.

Actions that appear on the Insights report are displayed based on the data returned in the report. For example, if the report returns data about a user, the **Freeze Member** and **Unfreeze Member** actions are displayed. If the report stops returning data, actions aren't removed. However, when you go to update the actions, we let you know that some are no longer appropriate.

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

Insights reports 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 Insights report.

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 act on them. Group owners or group managers, can view flags and act on items in their groups.

##### [Moderate Flagged Discussions in Your Community](#)

Community moderators can delete and unflag posts and comments from discussions, and freeze or communicate with the author of those posts, all from one place.

##### [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:

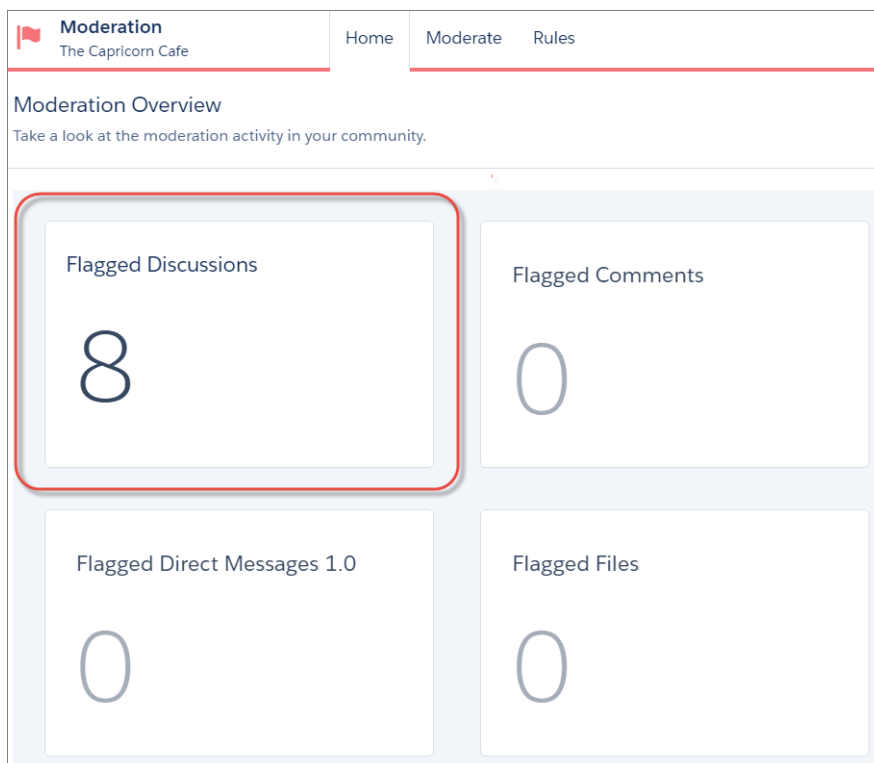
[Assign a Community Moderator](#)[Assign a Community Manager](#)

## 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 flagged posts and comments, click **Flagged Discussions** and go directly to the Flagged Discussions queue. You can approve or delete flagged posts and comments in bulk, directly from the queue.



### EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** 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, 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](#)

### 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**

## 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.

- 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.

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

## 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](#).
2. 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*

*b@dword*

*b a d w o r d*

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

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

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

### 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 Is a member of the community

## 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 **Moderation Member 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.

 **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

### 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

Is a member of the community

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.

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

### 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.

#### [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 %BLOCKED\_KEYWORD% or other inappropriate words in this community. Review your content and try again.” The %BLOCKED\_KEYWORD% 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

Is a member of the community

#### 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 your 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.



**Tip:** 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**  
**Is a member of the community**

- **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 %BLOCKED\_KEYWORD% or other inappropriate words in this community. Review your content and try again.” The %BLOCKED\_KEYWORD% variable displays up to 5 blocked words. You can also use this variable in your own custom message.
- **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?



**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.



**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.



**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**  
**Is a member of the community**

 **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 guidelines 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

Is a member of the community

 **Example:** Enable Record Feed Moderation from Communities

### Community Settings

**General Settings** Save Cancel

---

**Domain Name**

The default domain name for Communities in your organization is **sdodemo-main-14f0402c**

**Sample Domain Name**  
MyCompany.force.com

**Sample Community URLs**

- MyCompany.force.com/customers
- MyCompany.force.com/developers
- MyCompany.force.com/partners

---

**Community Role and User Settings**

Number of partner roles 3 ▼ i

Enable Partner Super User Access ☐ i

Enable report options for external users ☐ i

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

Moderation rules can be configured for internal users' feed posts on records ☐ i

Settings

## 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 Communities permissions 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.  
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.


### 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

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 act on them. Group owners or group managers, can view flags and act 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 act on it.

A few things to keep in mind:

- Moderators can only view and act on items they have access to.
- Within a community group, group owners or managers can moderate items in their groups, including viewing or removing flags and deleting posts, comments, or files.
- 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:

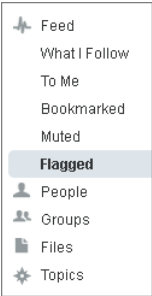
- View flagged posts and comments from the [Moderation Overview Home App](#) in the [Flagged Discussions queue](#) on page 348.

- Use a preconfigured Insights report in Community Management.

If you have not enabled Community Workspaces, use the Flagged Comments and Flagged Discussions 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.

- 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

- 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 the 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:

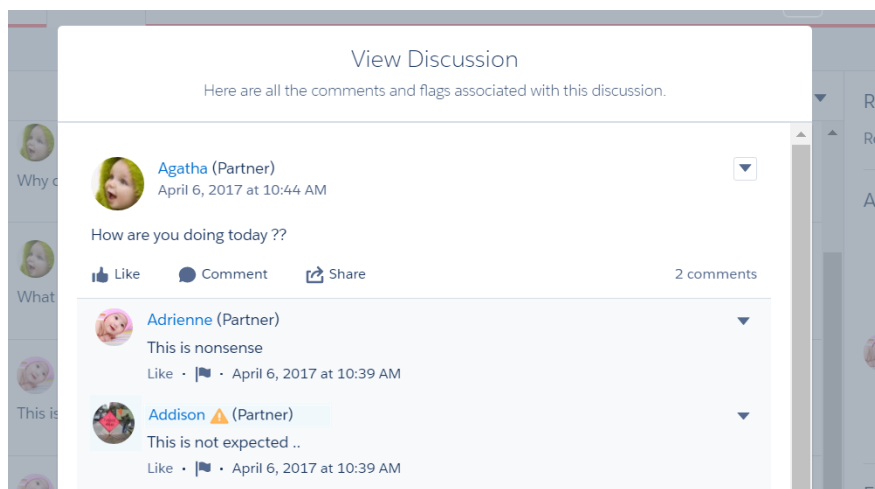
[Chatter REST API Developer Guide](#)

[Apex Developer Guide](#)

## Moderate Flagged Discussions in Your Community

Community moderators can delete and unflag posts and comments from discussions, and freeze or communicate with the author of those posts, all from one place.

Moderators can view an entire discussion in context (including all comments related to a post) and sort by the newest discussions or the oldest. Click **View Discussion** to open a discussion thread.



Click a post or comment or select **View Flag Details** to see how a post or comment has been flagged and who flagged it.

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

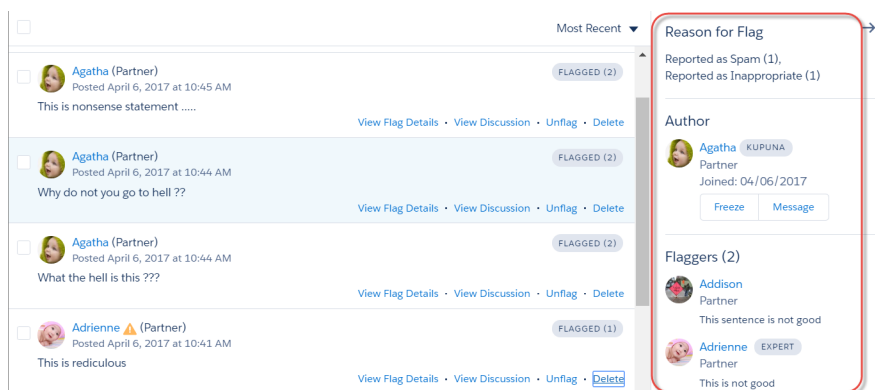
### USER PERMISSIONS

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

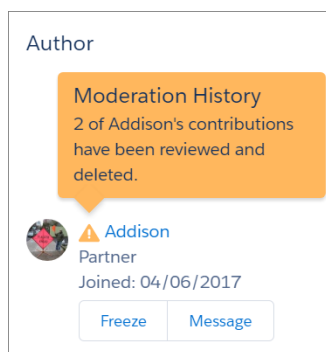
- Moderate Communities Feeds

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



Want to know more about the author of a flagged post? We've got you covered. You can see which authors have a history of flagged posts and how many times a moderator has deleted their posts. If necessary, freeze the author and send them a message from the same page.



A few things to keep in mind:

- The Flagged Discussions queue is available only in organizations that have [enabled Community Workspaces](#) on page 15.
- Moderators can only view and act on items they have access to.
- Within a community group, group owners or managers can moderate items in their groups, including viewing or removing flags and deleting posts, comments, or files.
- If `Allow members to flag content` is disabled in a community, only moderators can flag items and view flagged items.

Want to see what's going on in your community overall? Install the Salesforce Communities Management package from the AppExchange. For more information, see [Report on Communities with the AppExchange Packages for Community Management](#).

## 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 **Administration Preferences** 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

Is a member of the community



## 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.

 **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 “Manage Chatter Messages and Direct Messages” 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**.

### 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

Moderate 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 FeedItem, FeedComment, ChatterMessage, or ContentDocument.
- Define criteria that when met creates a NetworkModeration (flag) record, with the FeedComment, FeedItem, ChatterMessage, or ContentDocument as the parent.



**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 Insights report.

## Organize Customer Communities with Topics

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

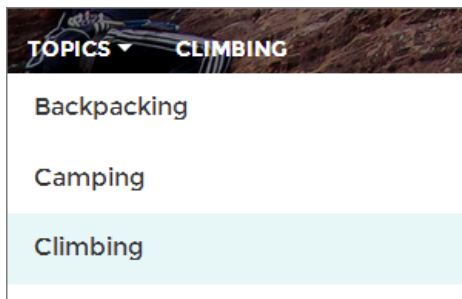
In Community Workspaces or Community Management, choose navigational topics and subtopics to provide a consistent map of your community. Use featured topics to highlight current, popular conversations. In the community itself, member-created topics let users organize information for each other, creating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

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

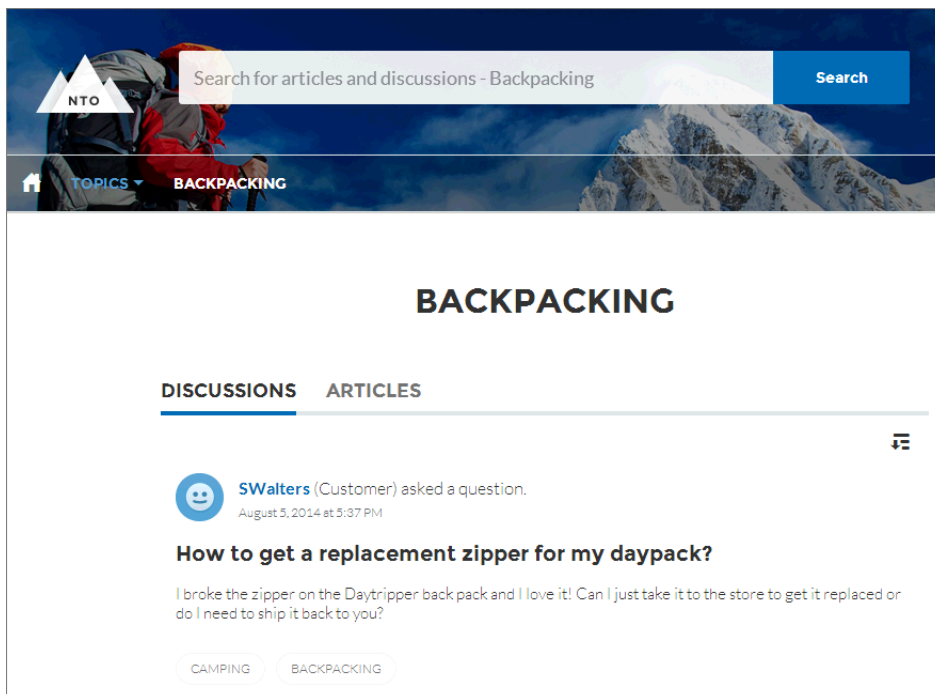
 **Tip:** To add navigational and featured topics to other types of communities, Apex developers can use the [ConnectApi.ManagedTopics class](#) in a Visualforce page.

## Navigational Topics

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

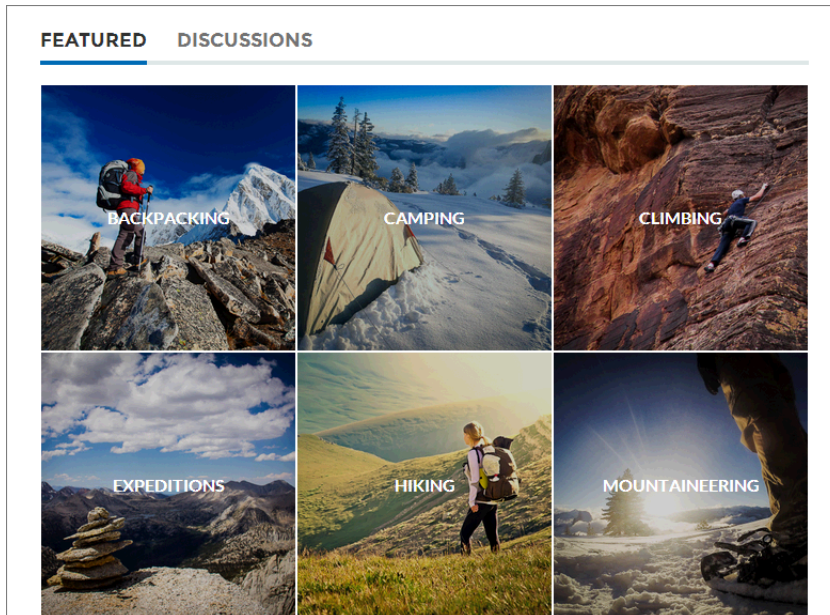


When visitors choose a navigational topic, the banner image you selected for it appears at the top of the page.



## Featured Topics

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



## Member-Created Topics

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

Post To **Backpacking** ▼

✕

What's the best backpack for a solo expedition?

I'm doing a solo hike of the Pacific Crest Trail next July. Any recommended packs for a #PCT trek like this?

Topics help get your questions seen by the right people

Camping, Expeditions

ASK

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.

[Automatically Assign Topics to Articles](#)

Transport all your hard work of organizing Salesforce Knowledge in your community by mapping topics to data categories. All articles published with a specific data category are tagged with the topics you specify. And future articles added to the data category will also be tagged.

[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> , and <b>Developer</b> Editions
To merge topics:	Merge Topics	
To delete topics:	Delete Topics	
To rename topics:	Edit Topics	

As the number of topics in a community grows, curate them to improve usability. Whether you've enabled Community Workspaces or are working in Community Management, you can create, merge, rename, and delete topics in one convenient location.

1. Open [Community Workspaces](#) or [Community Management](#).
2. If you're using Community Workspaces, access Topics by clicking **Content Targeting > Topics > Topic Management**. If you're using Community Management, access Topics by clicking **Topics > Topic Management**.
3. Do one of the following:
  - To create a topic (often with a plan to merge existing ones into it), click **New**. Add a name and a topic description, which will boost SEO.
  - To combine existing topics, click **Merge**.  
Merging a topic automatically redirects existing hashtags in posts. If you merge a navigational or featured topic, the topic type, image, and any subtopic relationships are discarded.
  - To rename or delete an existing topic, or add a description to it, click .  
If you don't see a topic you want to rename or delete, either search for it or click **Show More** below the topic list.



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


#### SEE ALSO:

[Set Up Navigational Topics](#)

[Set Up Featured Topics](#)

## Automatically Assign Topics to Articles

Transport all your hard work of organizing Salesforce Knowledge in your community by mapping topics to data categories. All articles published with a specific data category are tagged with the topics you specify. And future articles added to the data category will also be tagged.

1.  **Note:** To use automatic topic assignments, you must first enable **Community Workspaces** in Community Settings.
- Open Community Management.
2. Access Automatic Topic Assignment by clicking **Content Targeting > Topics > Automatic Topic Assignment**.
3. Enable **Automatic Topic**

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

### USER PERMISSIONS

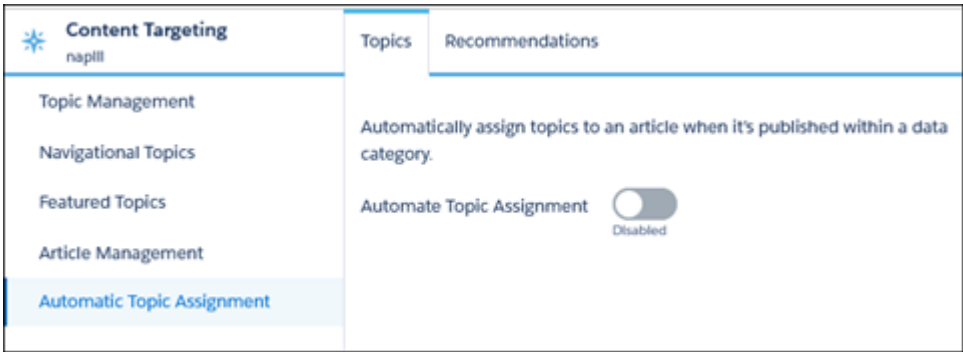
To access Community Workspaces or Community Management page:

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

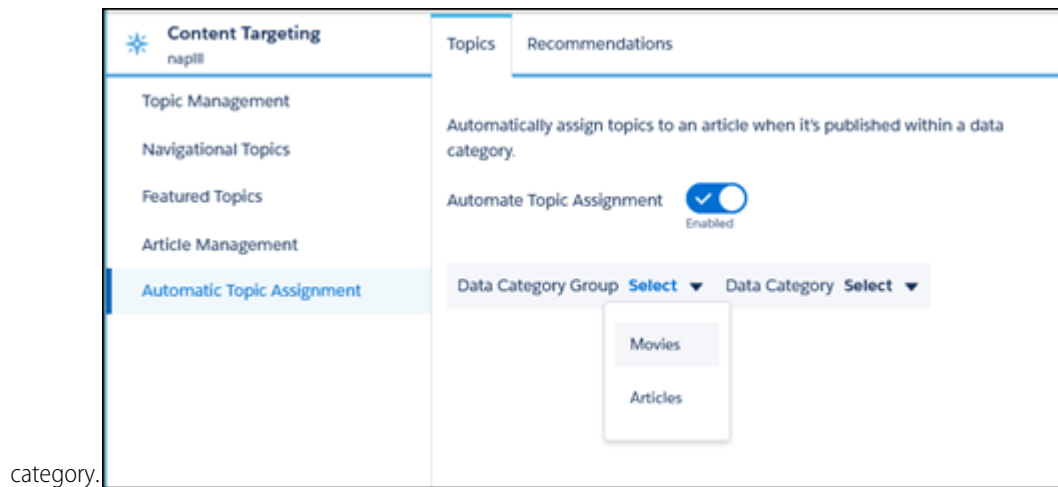
To set up automatic topic assignments:

- Edit Topics

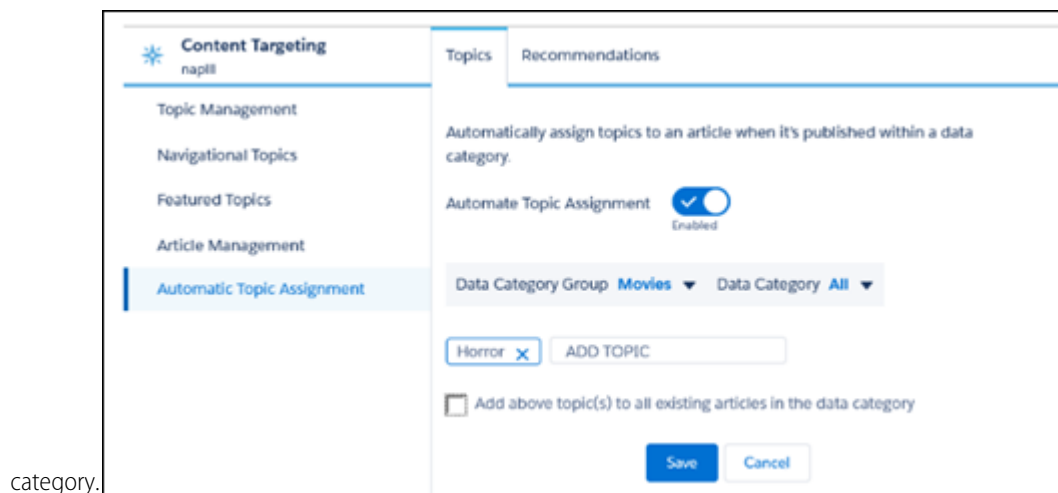
Assignment.



4. Select a data category group and a data



5. Add the topics that you want to assign to the articles under that data



6. Select the option to add the topics to existing articles in the data category. The topics are then assigned to all articles in all data categories under the data category group. If you don't select this option, the topics are added only to new articles added to the data category, and the existing articles remain unchanged.
7. Click **Save**.


Consider the following as you set up your topic assignment rules:


- Topic assignments are community-specific. If you use the same article in two different communities, set up automatic assignments in both communities.
- If a translation of a topic is available in Salesforce, the translated article is tagged with the corresponding translated topic. If there's no translated topic in the system, localized articles are tagged with the base language topic.
- You can't automatically remove topics from articles. Instead, you must manually remove topics.
- If you merge two topics, you must set up new rules.

## Set Up Featured Topics


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

1. Open [Community Workspaces](#) or [Community Management](#).
2. If you're using Community Workspaces, access Topics by clicking **Content Targeting > Topics > Featured Topics**. If you're using Community Management, access Topics by clicking **Topics > Featured Topics**.
3. Enter the first few letters of the topic name in the search box. Select a suggested topic and click **Add**. Use navigational or member-created topics.

 **Tip:** Using the Chatter REST API, you can create unique featured topics, separate from navigational or member-created ones.

4. Hover over a topic name, and click . Then click **Upload thumbnail image**, and select an image that represents the featured topic on the community home page.  
(Thumbnail images are scaled to 250 x 250 pixels. To prevent distortion, create image files with those dimensions.)
5. Repeat steps 3 and 4 to create several featured topics for your community, up to a maximum of 25. Then click **Save**.

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

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

### 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.
5. If your organization uses data categories, hover over the navigational topic name, and click . Select a Data Category Group, then select the categories you want to add to the topic, and click **Add Articles & Close Window**.



**Important:** This process adds only current articles to a topic. To add new articles, return to Community Management or Community Workspaces and repeat the step above.

6. Hover over a topic name, and click . Then click **Upload banner image** and select an image that appears across the top of the topic page.

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

7. Repeat steps 4-6 to create several navigational topics for your community. Then click **Save**.
8. Use subtopics to further categorize your content. Associate articles for each set of subtopics for a more granular organization.  
The following is the maximum number of navigational topics and subtopics you can have in a Customer Service (Napili) community template.

Level	Maximum Number of Entries
One (parent)	25
Two (subtopic)	10
Three (subtopic)	10

### 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



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

- To move a topic up or down, click the arrows at left.

- To rename or remove a topic, change its banner image, or remove assigned articles, click .

SEE ALSO:

[See Your Community's Topics and Subtopics in One Place](#)

## See Your Community's Topics and Subtopics in One Place

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

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

How is the topic catalog useful to your community members?

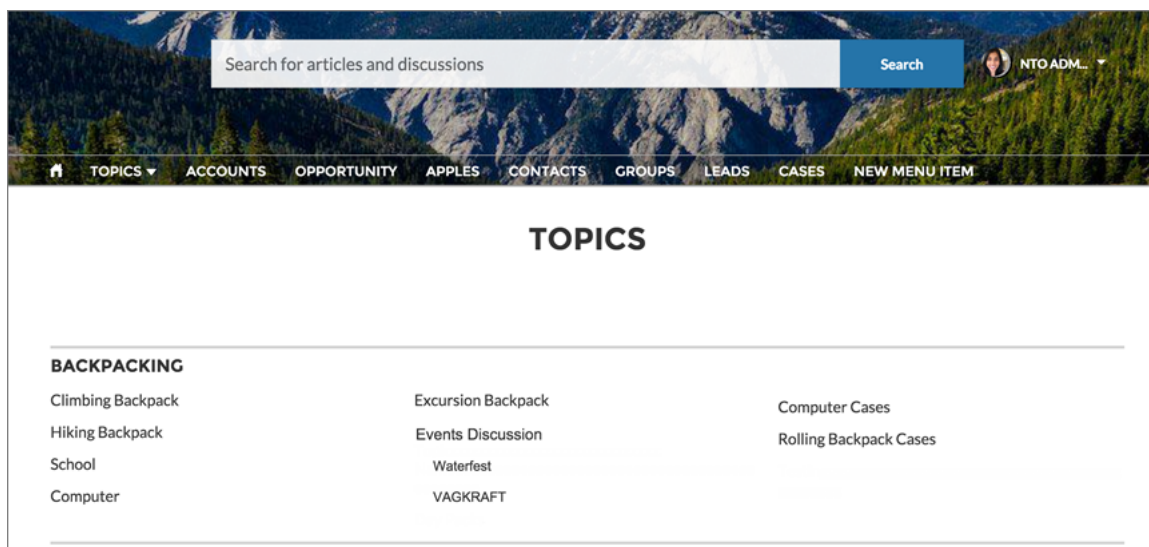
- New and returning users look at all the organized topics in one place, getting a lay of the land before diving deeper into a specific topic.
- Any community user can use the topic catalog as a jumping point to go from topic to topic.

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

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



**Example:**




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
<code>{!actionLinkId}</code>	The ID of the recommendation link that the user clicked.
<code>{!actionLinkGroupId}</code>	The ID of the recommendation link group containing the recommendation that the user clicked.
<code>{!communityId}</code>	The ID of the community in which the user clicked the recommendation. The value for your internal Salesforce org is the empty key, <code>"000000000000000000"</code> .
<code>{!orgId}</code>	The ID of the org in which the user clicked the recommendation.
<code>{!userId}</code>	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**.

 **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.

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

### USER PERMISSIONS

To access Community Workspaces or Community Management:

- Manage Communities
- OR
- Create and Set Up Communities

### 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
<b>Community Engagement</b>	
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
<b>Questions and Answers</b>	
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
<b>Knowledge</b>	
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 **Administration Preferences** 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](#).
2. 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  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
<b>Community Engagement</b>	
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
<b>Questions and Answers</b>	
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
<b>Knowledge</b>	
Endorsing someone for knowledge on a topic	5
Being endorsed for knowledge on a topic	20

Questions and answers in the community feed are not to be confused with the Chatter Answers functionality.

 **Note:** In organizations with reputation enabled prior to the Winter '15 release, actions associated with questions and answers will be available at the time of the release and their default point values will be set to 0. Existing user reputation points will not be affected by the release, and users won't accrue points from these actions until you configure point values for them.

1. Open [Community 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**.
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.

Action	Points
<b>Community Engagement</b>	
Write a post	1

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

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
<b>Questions and Answers</b>	
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
<b>Knowledge</b>	
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

[Service Community Scorecard](#)

Track member use, service metrics, and search activity using the Service Community Scorecard.

[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™ 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?](#)

Service Community Scorecard is a community manager's complete view of a self-service community. From measuring engagement to tracking search efficiency, the Service Community Scorecard helps you keep your community in tip-top shape. We've also added new reports to track the daily participation of community members.

#### 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](#)

The cleanest way to upgrade the package is to completely uninstall the existing one. However, this can get complicated and may cause you to lose your customizations. We recommend reinstalling only if you want to start clean and make sure you have only the latest and greatest versions of our reports. If you haven't upgraded for a few releases, the clean slate may be the best approach.

### [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.

### [Service Community Scorecard](#)

Some of the most common feedback we get is that community managers need a single dashboard providing information about the success of a community. In Summer '17, we are proud to announce the Service Community Scorecard. It gives community managers for self-service and support communities the information they need all in one place. If your community is not a service community, use it as inspiration or a starting point to create your own scorecard.

### [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?

Service Community Scorecard is a community manager's complete view of a self-service community. From measuring engagement to tracking search efficiency, the Service Community Scorecard helps you keep your community in tip-top shape. We've also added new reports to track the daily participation of community members.



### EDITIONS

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



**Tip:** The ✨ symbol identifies all the new components in this release.

## Enable Community Workspaces

Community Workspaces is our fantastic new community management interface, and the replacement for the old Community Management Console. We highly recommend you switch. 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 Between Community Workspaces and Community Management?

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.

## 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 10.0 features include:

New custom report types: Network User Participation Daily Metrics

New Service Community Scorecard with these reports:

- Total Members
- Daily Active Users
- Top 10 Members by Reputation
- Top Unanswered Questions
- Searches with No Results (30 Days)
- New Members (7 Days)
- New Members with Profile Pic
- New Members (90 Days)
- Cases Opened
- Case Resolution Time
- Oldest Open Cases
- Topics Most Talked about 3.0
- Questions vs. Best Answers

[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

## 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

## 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.



**Note:** To install the version of the package for Communities with Chatter, Chatter must be enabled. There are no prerequisites to install the version of the package for communities without Chatter.

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**.
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.

### 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 install packages:

- Download AppExchange Packages

Dashboards

Logitech

Overview

Members

Activity

Group

Topics

Content

Moderation

Self Service

Search

Settings

Home

Reporting


Engagement

Dashboards



The dashboards you see here correspond to dashboards in your internal org. Select the dashboards you want to display in your community. [Settings](#) to view and customize each dashboard page. [i](#)


Label	Dashboard
Home	<div><div>Sample Community Dashboard</div><div><div></div><div>✕</div><div>▼</div></div><div>Edit Dashboard</div></div>
Overview	<div><div>Overview 1.0</div><div><div>✕</div><div>▼</div></div><div>Edit Dashboard</div></div>
Members	<div><div>Members 1.0</div><div><div>✕</div><div>▼</div></div><div>Edit Dashboard</div></div>
Activity	<div><div>Activity 1.0</div><div><div>✕</div><div>▼</div></div><div>Edit Dashboard</div></div>
Group	<div><div>Groups 1.0</div><div><div>✕</div><div>▼</div></div><div>Edit Dashboard</div></div>
Topics	<div><div>Topics 1.0</div><div><div>✕</div><div>▼</div></div><div>Edit Dashboard</div></div>
Content	<div><div>Files 1.0</div><div><div>✕</div><div>▼</div></div><div>Edit Dashboard</div></div>
Moderation	<div><div>Moderation 1.0</div><div><div>✕</div><div>▼</div></div><div>Edit Dashboard</div></div>
Self Service	<div><div>Self-Service 1.0</div><div><div>✕</div><div>▼</div></div><div>Edit Dashboard</div></div>


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, you may want to uninstall it before reinstalling the new version. However, 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	<div>Provides the <a href="#">License Usage 1.0</a> and <a href="#">Community Search Dashboard 2.0</a> dashboards.</div> <div> <b>Note:</b> Don't map these dashboards in Community Management; view them in your internal org.</div>	<div>✓</div>	<div>✓</div>
Lighting Communities Dashboards	<div>Provides the dashboards that map to <b>Dashboards</b> in Community Management and Community Workspaces, including your home page.</div> <div> <b>Note:</b> Installing the package doesn't auto-map a dashboard for your home page, you must map one yourself.</div>	<div>✓</div>	

Folder Name	Description	Package with Chatter	Package without Chatter
Communities Reports	Provides the reports used in your Community Management dashboards. These reports are used in the dashboards in <b>Dashboards &gt; Reporting</b> if you are using Community Workspaces.	✓	✓
Community Management Home Reports	Provides the reports used in your Community Management home dashboard. These reports are in <b>Dashboards &gt; Home</b> if you are using Community Workspaces.	✓	✓
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 <b>Community Management &gt; Engagement</b> or in <b>Dashboards &gt; 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 <b>Community Management &gt; Moderation</b> or in <b>Moderation &gt; Moderate</b> if you are using Community Workspaces.	✓	
Flagged Files	Provides the Flagged Files Report.	✓	
Flagged Messages	Provides the Flagged Direct Message Report and Flagged Private Message Report.	✓	
Misc Communities Reports	Provides reports that are <a href="#">feature-dependent</a> , such as reports that require Chatter messages, direct messages, or the community case feed.	✓	
Chatter Dashboards	Provides reports and dashboards to track Chatter usage in your internal Salesforce org.	✓	
Chatter Reports	 <b>Note:</b> These folders don't map to anything in Community Management or Community Workspaces	✓	

 **Note:** If you are installing the package for Communities without Chatter, you also still have a Community Management Home Dashboards folder.

## Upgrade Considerations

The cleanest way to upgrade the package is to completely uninstall the existing one. However, this can get complicated and may cause you to lose your customizations. We recommend reinstalling only if you want to start clean and make sure you have only the latest and greatest versions of our reports. If you haven't upgraded for a few releases, the clean slate may be the best approach.

If you choose to just go ahead and upgrade, don't worry--during the upgrade, your customizations are preserved. We don't overwrite anything you've tweaked. However, we can't port over your customizations to any new versions of reports or dashboards that we happen to be installing. That's ok. The old, customized versions will keep working just fine.

But, if we update existing reports or dashboards, we do recommend that you recreate any customizations you've made and then delete the older component versions



**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.

For those with a service community who have upgraded to Summer '17, we strongly recommend you change the mapping for your Home dashboard to the new Service Community Scorecard.


## 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.



**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

### 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) 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.

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

## 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







Adoption [Visit our Success Community | Help](#)

Active Members

Freeze Member Unfreeze Member

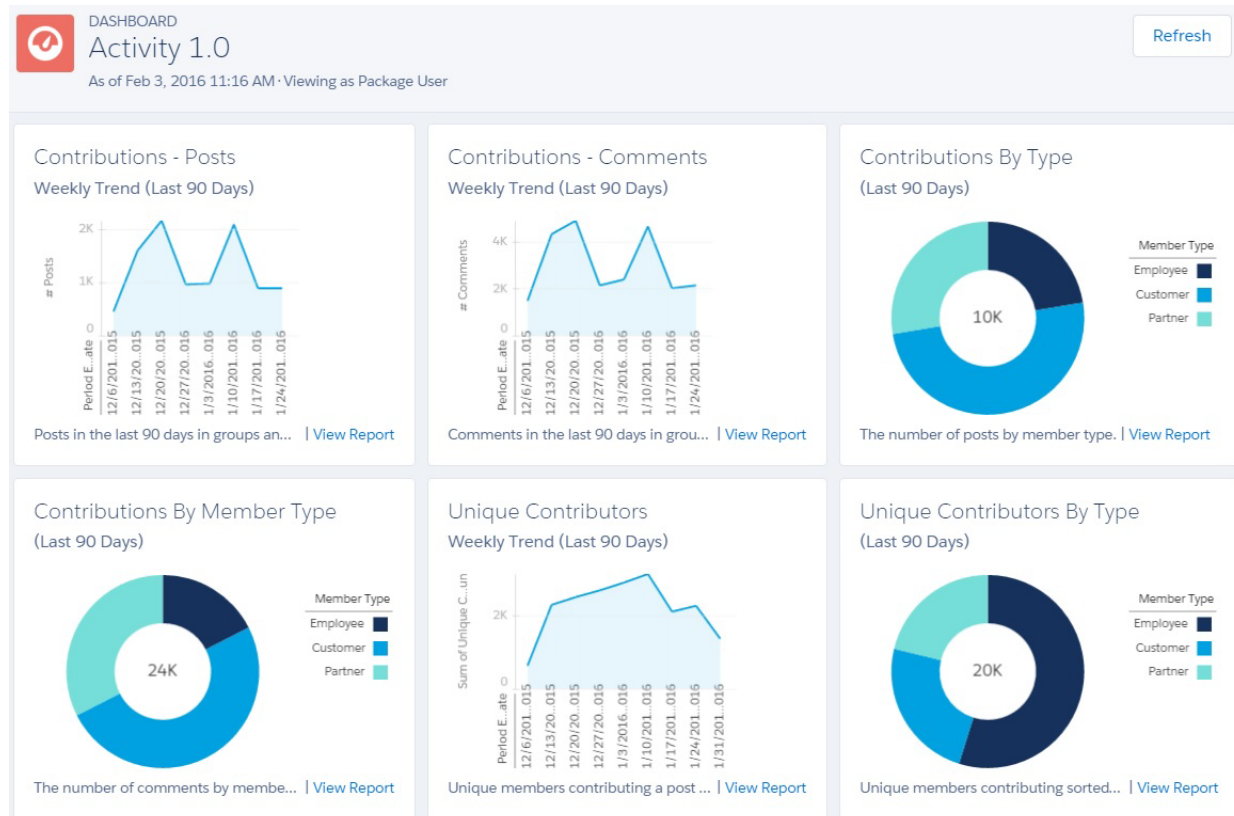
Last 7 Days From 6/1/2016 To 6/7/2016

Filtered by Chatter Activity: Last Login

<input type="checkbox"/>	Member	Last Login	# Posts	# Comments	# Comments Received	# Likes
<input type="checkbox"/>	 Ann Weill	6/1/2016 10:57 AM	7	5	2	4
<input type="checkbox"/>	 Eric Ware	6/7/2016 2:18 PM	14	14	10	6
<input type="checkbox"/>	 Lauren Boyle	6/7/2016 10:32 AM	7	1	1	0
<input type="checkbox"/>	 Joe Spammer	6/4/2016 3:41 PM	1	0	0	0
<input type="checkbox"/>	 Kim Smith	6/4/2016 5:19 PM	2	0	0	0
<input type="checkbox"/>	 Joe Spammer	6/3/2016 2:17 PM	0	0	0	0

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.



## Service Community Scorecard

Some of the most common feedback we get is that community managers need a single dashboard providing information about the success of a community. In Summer '17, we are proud to announce the Service Community Scorecard. It gives community managers for self-service and support communities the information they need all in one place. If your community is not a service community, use it as inspiration or a starting point to create your own scorecard.

How do you get the Service Community Scorecard? If you are installing this package for the first time, it automatically maps to your dashboards home tab. If you are updating to this package, you have to map manually.

Got it? Great! We prepopulated the scorecard to get you up and running. However, you can always customize it to best fit your community. More info on that part in a bit. Here's what you start out with:

- **Membership:** Three reports, broken down into contributors and observers. Make sure that Reputation is on to get the most out of the Top 10 Members by Reputation report.
  - Total Members
  - Daily Active Users
  - Top 10 Members by Reputation

- **Information Discovery:** Two reports that show what users are not finding in the community. A great report to add next to these new reports is “Most Viewed Articles”, but it’s part of a different AppExchange package. See <https://appexchange.salesforce.com/listingDetail?listingId=a0N30000003HXO9EAO> for details.
  - Top Unanswered Questions
  - Searches with No Results (30 Days)
- **New Members:** Three reports that tell you how many new members have joined your community and whether they have profile photos, a strong sign of their engagement.
  - New Members (7 Days)
  - New Members with Profile Pic
  - New Members (90 Days)
- **Cases:** Three reports all about customer cases. These reports include all cases in your org, not just those cases created through the community. We recommend marking cases created in the community so you can filter to just those particular cases.
  - Cases Opened
  - Case Resolution Time
  - Oldest Open Cases
- **Topics and Questions:** Two reports that let you keep tabs on hot topics and open questions vs. questions that have been marked with a best answer.
  - Topics Most Talked About 3.0
  - Questions vs. Best Answers

Ready to customize the Service Community Scorecard or use it to create your own scorecard? Go to your internal org and click the Dashboard tab. Search for “Service Community Scorecard” and click **Edit** to add or remove reports or change the name of your scorecard.

SEE ALSO:

[Enable and Map Dashboards for Community Managers](#)

## 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.

 **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

Home Moderate Rules

## Flagged


Flagged Posts 3.0

Flagged Comments 3.0  
Flagged Direct Messages 1.0  
Flagged Files 3.0  
Flagged Posts 3.0  
Flagged Private Messages 3.0

From 2/15/2017 To 2/15/2017

Delete Post Unflag Post

Title	Created On	Moderated By	Posted By
<input type="checkbox"/> What all new coffee flavors added in this season at coffeartwork.com ?	2/15/2017	Lauren Boyle	Lau
<input type="checkbox"/> Did anyone had a look on coffeartwork.com ??	2/15/2017	Lauren Boyle	Lau

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.

Pending

Visit our Success Community | Help for this Page ?

Posts Pending Approval

Custom From To

Approved Post Delete Post

Filtered by Feed Posts: Created On



Title	Content	Created On	Moderated By
<input type="checkbox"/> Help! Am I going crazy here?	I've been following the brewing instructions for making the perfect latte and just can't seem to ...	5/3/2016	Joe Santana
<input checked="" type="checkbox"/> Amazing coffee machines!	Check out my amazon page. You can find me at kimmycoffee. Cheap and high quality. Amazing! Act no...	6/4/2016	Kim Smith
<input checked="" type="checkbox"/> Best Jasmine Tea NOW! Contact me and you'll lose weight in 5 days or less.		6/4/2016	Kim Smith
<input type="checkbox"/> I just bought my coffee machine and it's stopped working.	I just bought my coffee machine and it's stopped working. Very annoyed ! Can you help?	4/26/2016	Lauren Boyle
<input type="checkbox"/> I just purchased the Tea strainer and am confused how it works...	This is the first time that I'm trying to strain a new type of tea leaf and it just doesn't work ...	4/27/2016	Lisa Wong

 **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.

Active Members	Refresh	Edit Report
Custom	From 7/8/2015	To 2/9/2016
Filtered by Chatter Activity: Last Login		
Member	Last Login	# Posts
 Eric Ware	2/9/2016 1:15 PM	37
 John Luke	7/27/2015 3:10 PM	1

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	Custom Report Type
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	Custom Report Type
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.   <b>Important:</b> Adjust the report filters to fit your community.	Network Member Activity 1.0
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.   <b>Important:</b> 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.   <b>Important:</b> 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	Custom Report Type
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	Custom Report Type
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	Custom Report Type
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	Custom Report Type
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	Custom Report Type
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 2.0	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	Description	Custom Report Type
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 416 section)

 **Note:** This Insights page supports communities using the Napili template.

Report Name	Description	Custom Report Type
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	Custom Report Type
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.



**Note:**

- 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.

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

### IN THIS SECTION:

#### [Service Community Scorecard](#)

Use the Service Community Scorecard dashboard to track member use, service metrics, and search activity.

#### [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.

## Service Community Scorecard

Use the Service Community Scorecard dashboard to track member use, service metrics, and search activity.

Understanding the health of your self-service community takes more than just keeping up with spam. Healthy communities allow for effective collaboration, provide quick resolutions to issues, and are full of engaged, active members. The Service Community Scorecard helps you track all this information in one place.

Report Name	Description	Custom Report Type
◆ Total Members	Total Number of community members.	Network Members 3.0
◆ Daily Active Users	Daily report of contributors and observers in the community.	◆ Network User Participation Daily Metrics
Top 10 Members By Reputation	Top 10 community members ranked by Reputation points.	Network Members 2.0
◆ Top Unanswered Questions	Top unanswered questions with the most likes.	Network User Activity 2.0
Searches With No Results (30 Days)	Searches yielding zero results within the last 30 days.	Community Search 2.0
◆ New Members (7 Days)	New members within the last 7 days.	Network Members 3.0
◆ New Members with Profile Pic	New member report indicating which members have added a profile picture and which have not.	Network Members 3.0
New Members (90 Days)	New members within the last 90 days.	Network Membership Daily Metrics 2.0
◆ Cases Opened	Ratio of open cases to closed cases.	Cases
◆ Case Resolution Time	Weekly report on the average case resolution time.	Cases

Report Name	Description	Custom Report Type
✦ Oldest Open Cases	Report on open cases ranked from oldest to newest.	Cases
✦ Topics Most Talked About 3.0	Topics created in the last 7 days with the highest “Talked About” score.	Network Topics 3.0
✦ Questions vs. Best Answers	Daily report comparing the number of questions asked to the number of best answers given.	Network Activity Daily Metrics 2.0

## 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.

In Summer '17, we are shipping a new dashboard called Service Community Scorecard as the default Home dashboard. If you have a service community, this is definitely the Home dashboard you will want to use.



If you have another type of community, you may want to pick from the older set of Home dashboards available. We provide dashboards for short-term and long-term data, with options for self-service communities and communities with or without Chatter.

**Note:** If you are installing the package for the first time, you will automatically see the Service Community Scorecard as your Home dashboard. If you are upgrading, you will have to map the scorecard to Home manually.

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.

### 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
Service Community Scorecard	Dashboard for communities with Chatter.	✓	

Dashboard Name	Description	Package with Chatter	Package Without Chatter
Activity in Your Community in the Last 90 Days	Dashboard for self-service communities, such as communities using the Napili template.	✓	
Activity in Your Community in the Last 12 Months		✓	
Activity in Your Self-Service Community in the Last 90 Days		✓	
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	✓	

Report Name	Description	Custom Report Type	Package with Chatter	Package Without Chatter
Contributions	Total number of posts and comments in the last 30 days across groups and user profiles.	Network Activity Daily Metrics 2.0	✓	
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	✓	
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	✓	✓
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	✓	

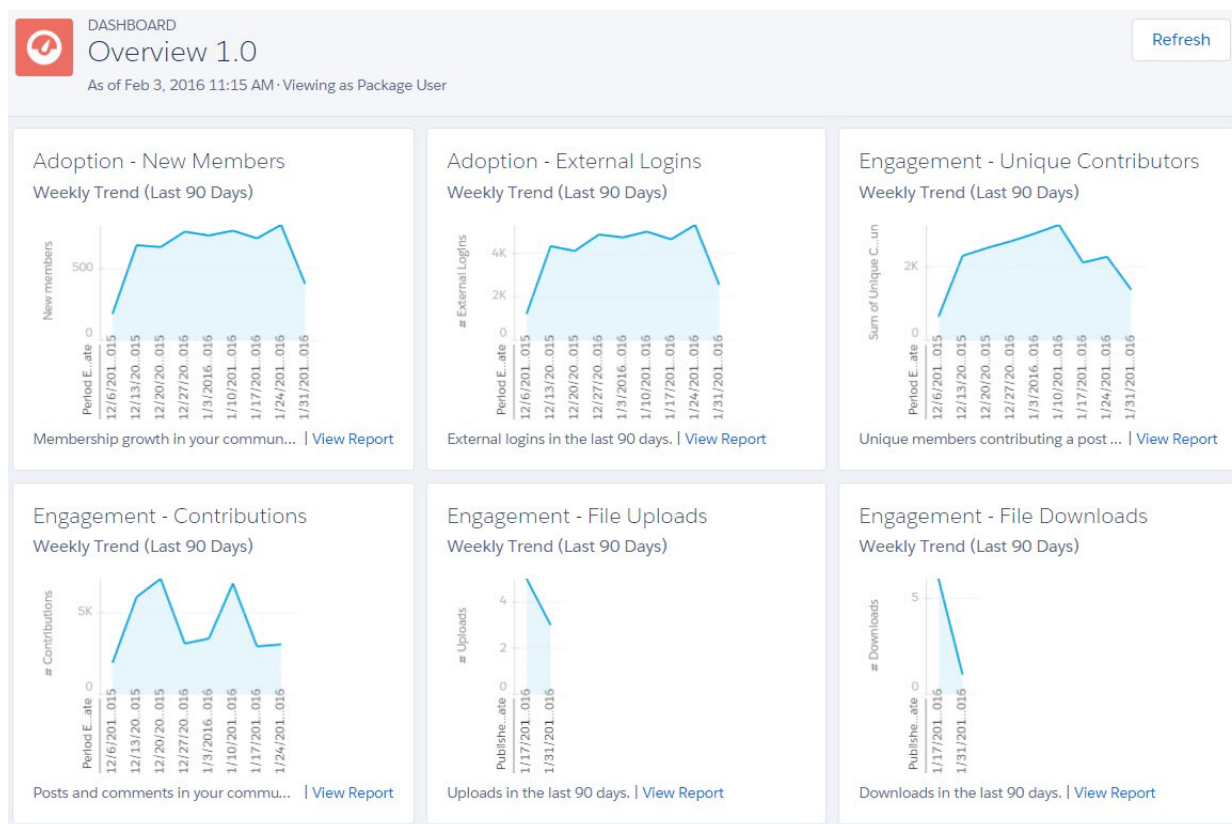
Report Name	Description	Custom Report Type	Package with Chatter	Package Without Chatter
Page Views - Weekly Trend	Weekly trending report on the daily page views generated by guest users in your community.	Network Public Usage Daily Metrics 2.0	✓	
Posts	Total number of posts in groups and user profiles 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	✓	
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	✓	

## Overview Dashboard and Reports

Use the Overview dashboard to track membership growth, login trends, and members' post and comment activity in Chatter.

With this dashboard, you can see:

- 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	✓

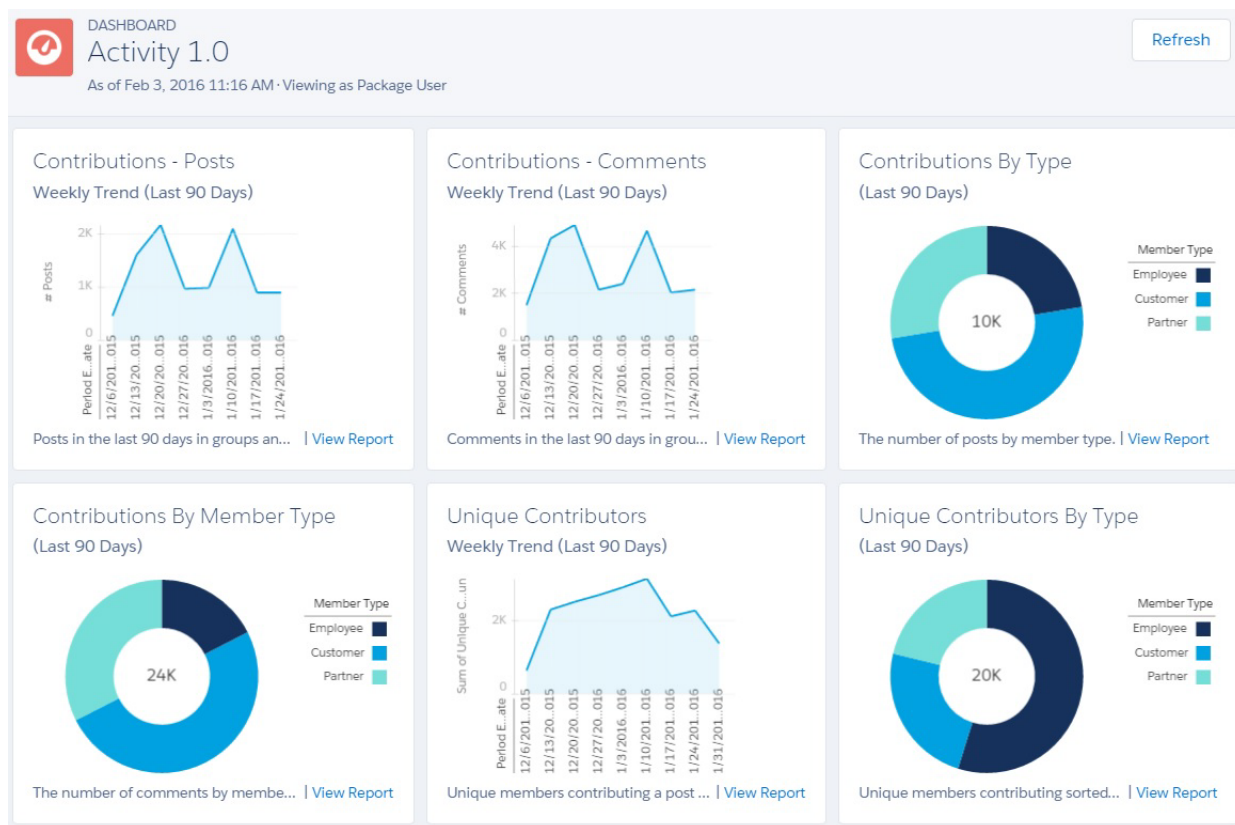
Report Name	Description	Custom Report Type	On Dashboard?
T - Topics Assigned L90D	Topics assigned in the last 90 days.	Network Topic Assignments 3.0	✓
T - Topics Created L90D	Topics added in the last 90 days.	Network Topics 2.0	✓

## 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?



**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	✓

## 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.



**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

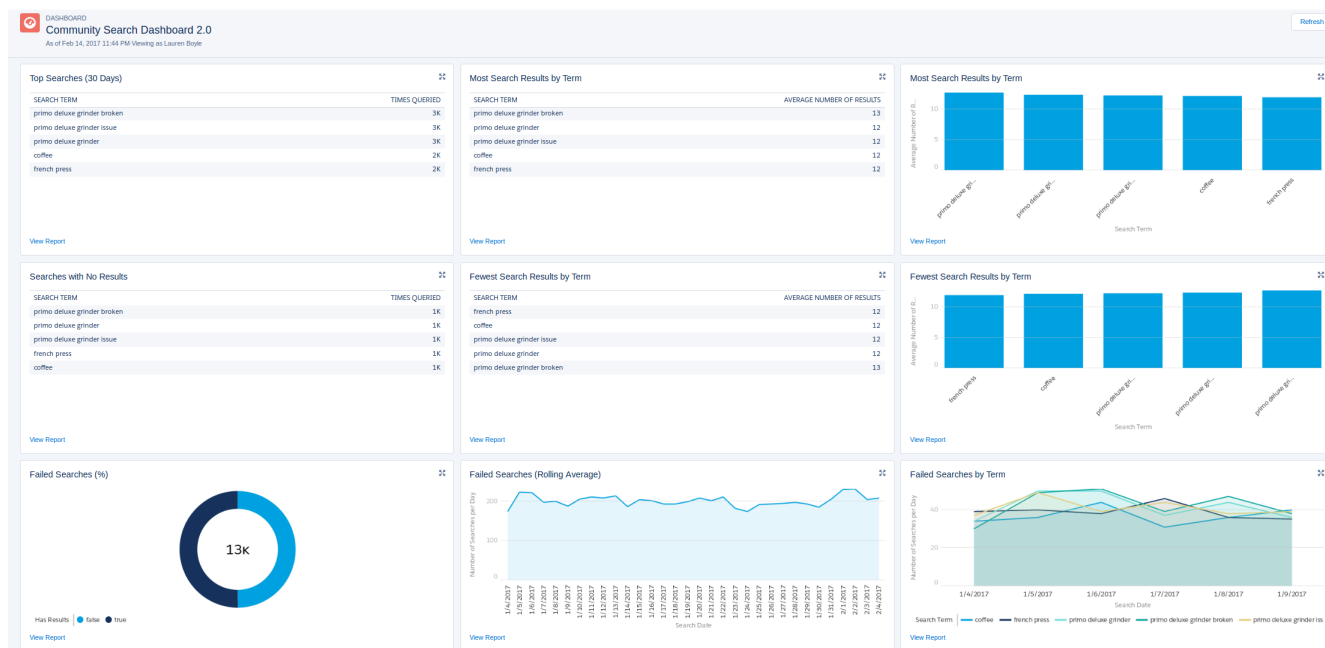
Report Name	Description	Custom Report Type
CH - Chatter Edits By Feed Type	Distribution of community Chatter edits by feed type: posts or comments.	Network Chatter Edits 1.0
CH - Chatter Edits By Member Type	Distribution of community Chatter edits by member type: internal, partner, or customer.	Network 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?
Autocomplete Click-Through % (Last 30 Days)	What percentage of autocomplete search results had a successful click?	Community Searches 2.0	

Report Name	Description	Custom Report Type	On Dashboard?
Autocomplete Search Usage (30 Days)	Are users clicking on suggested search results?	Community Searches 2.0	
Logged-In vs Guest Search (Last 30 Days) 2.0	How many community users are logged in when they enter a search term?	Community Searches 2.0	
 <b>Note:</b> This report has been enhanced in the current package.			
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	
 <b>Note:</b> 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	
 <b>Note:</b> 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	
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	
Searches with Zero Results (30 Days)	How many search results are returned per search term?	Community Searches 2.0	

## Files Dashboard and Reports

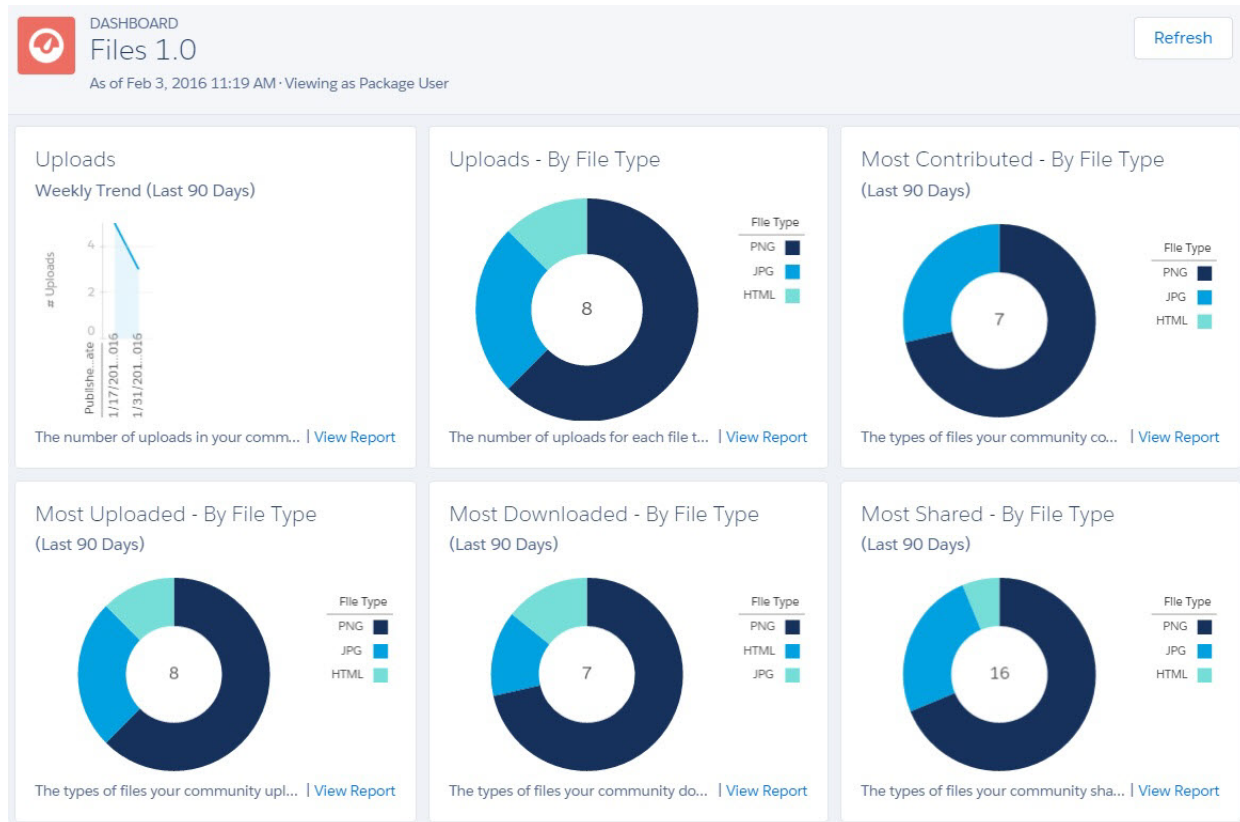
Use the Content dashboard to track content uploads, downloads, engagement, and content creators.

With this dashboard, you can answer:





- 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?

**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	
C - File Activity By File Type L90D	Reports on the types of files uploaded and downloaded in your community.	File and Content Report	<input checked="" type="checkbox"/>

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.		
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	<p>Top 10 users who received the largest number of posts and comments on their files in the last 30 days.</p> <p> <b>Note:</b> 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.</p>	File and Content Report	
C - Top 10 Users - Most File Likes L30D	<p>Top 10 users who received the largest number of likes on their files in the last 30 days.</p> <p> <b>Note:</b> 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.</p>	File and Content Report	
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

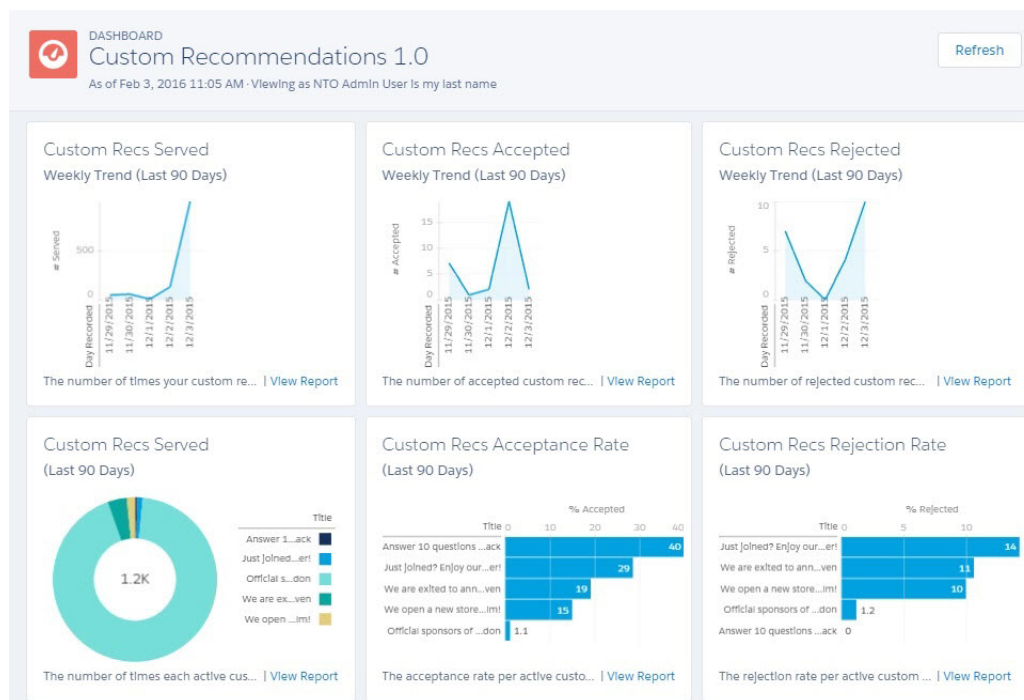
Use the Custom Recommendations dashboard to see how your community's custom recommendations are doing.

You can see how often your recommendations are viewed, clicked, or dismissed. You can view data for individual recommendations or across channels.

With this dashboard you can answer:

- Which recommendations are being clicked the most?
- Which recommendations are being rejected the most?
- Are my custom channels helping my recommendations?

 **Important:** This dashboard and its reports are *only* available in the package with Chatter.



## IN THIS SECTION:

[Recommendations FAQ](#)

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.	Network Custom Recommendations 1.0	

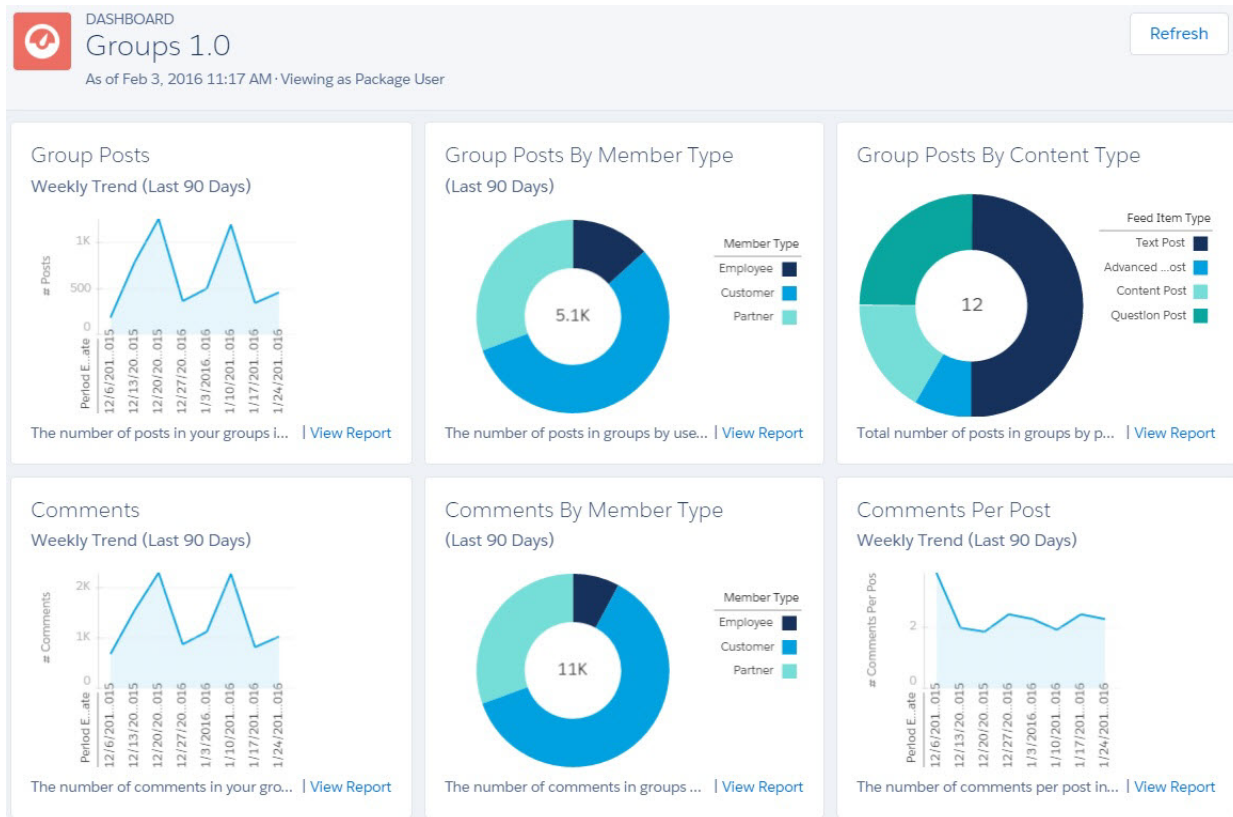
## Groups Dashboard and Reports

Use the Groups dashboard to monitor feed and member activity in Chatter groups.

With this dashboard, you can answer:

- 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?

 **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	✓
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.

With this dashboard, you can answer:

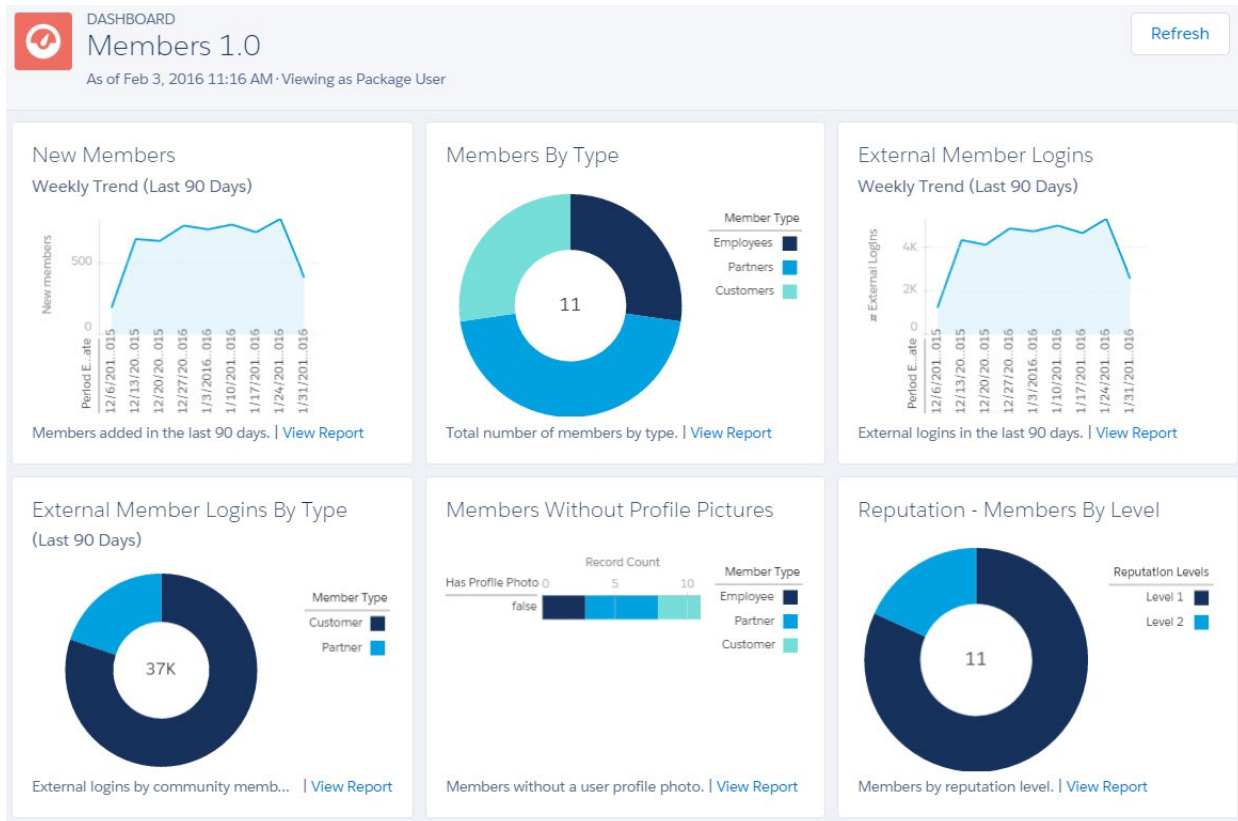
- How many members are there and how many are new?
- Which members are logging in the most?
- Which new members are logging in the most?



**Tip:** If your community is not using the reputation feature, you can remove the reports and metrics associated with the feature.



**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	✓
O - External Logins L90D	External logins by community member type in the last 90 days.	Network Membership Daily Metrics 2.0	✓

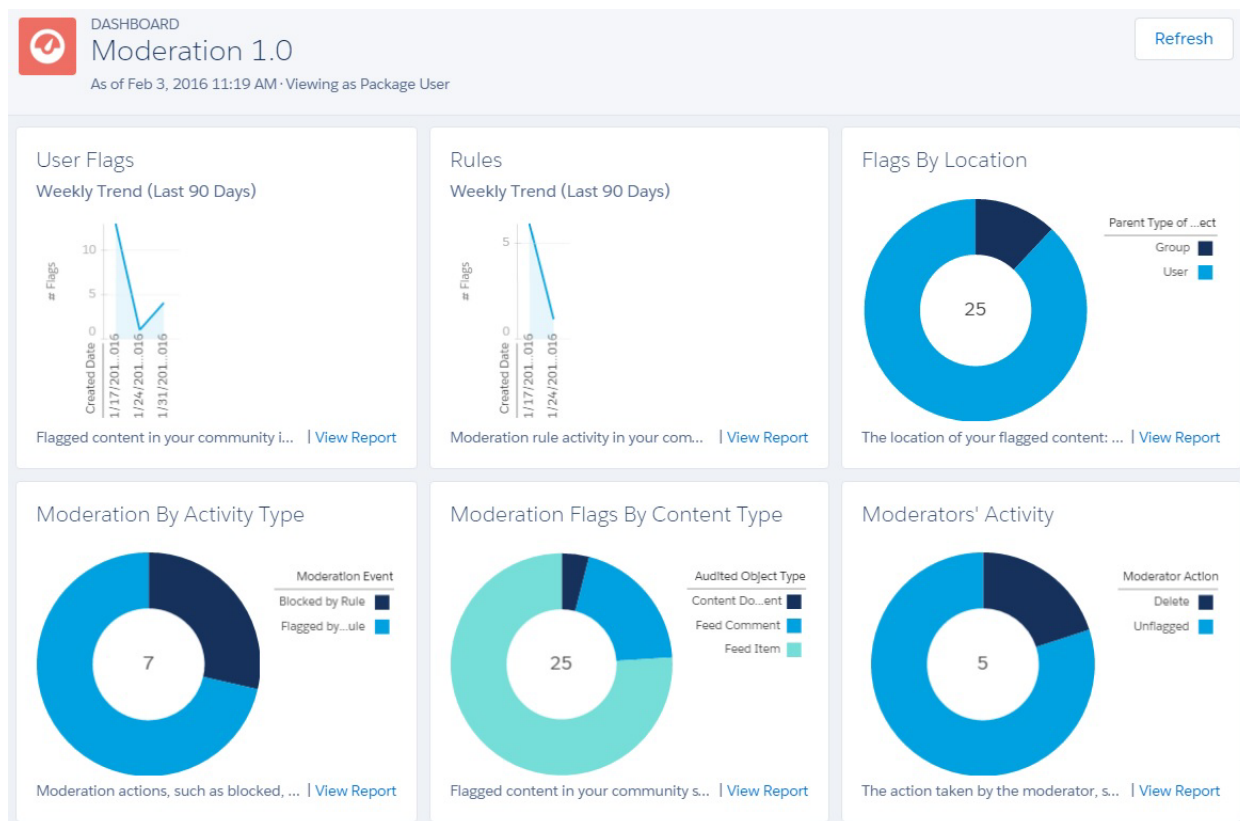
## Moderation Dashboard and Reports

Use the Moderation dashboard to track community moderators' and members' flagging activity.

With this dashboard, you can answer:

- How many flags are there?
- Who is flagging content?
- Who is removing flags?
- How many private messages are being sent?

**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	✓
MO - Rule Activity L90D	Trending report on moderation rule activity in your community in the last 90 days.	Network Moderation 2.0	✓
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

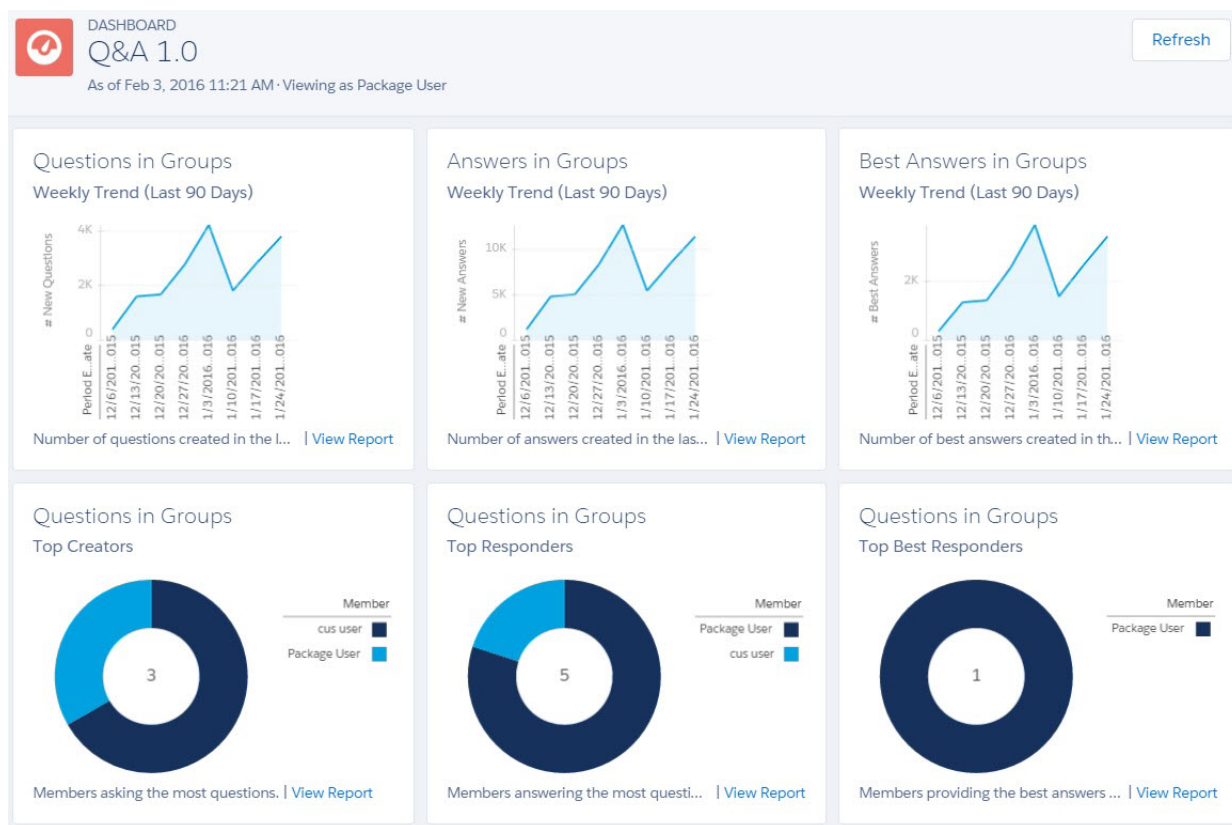
Use the Q & A dashboard to track recent activity for questions, answers, and best answers posted in groups

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?

**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	✓

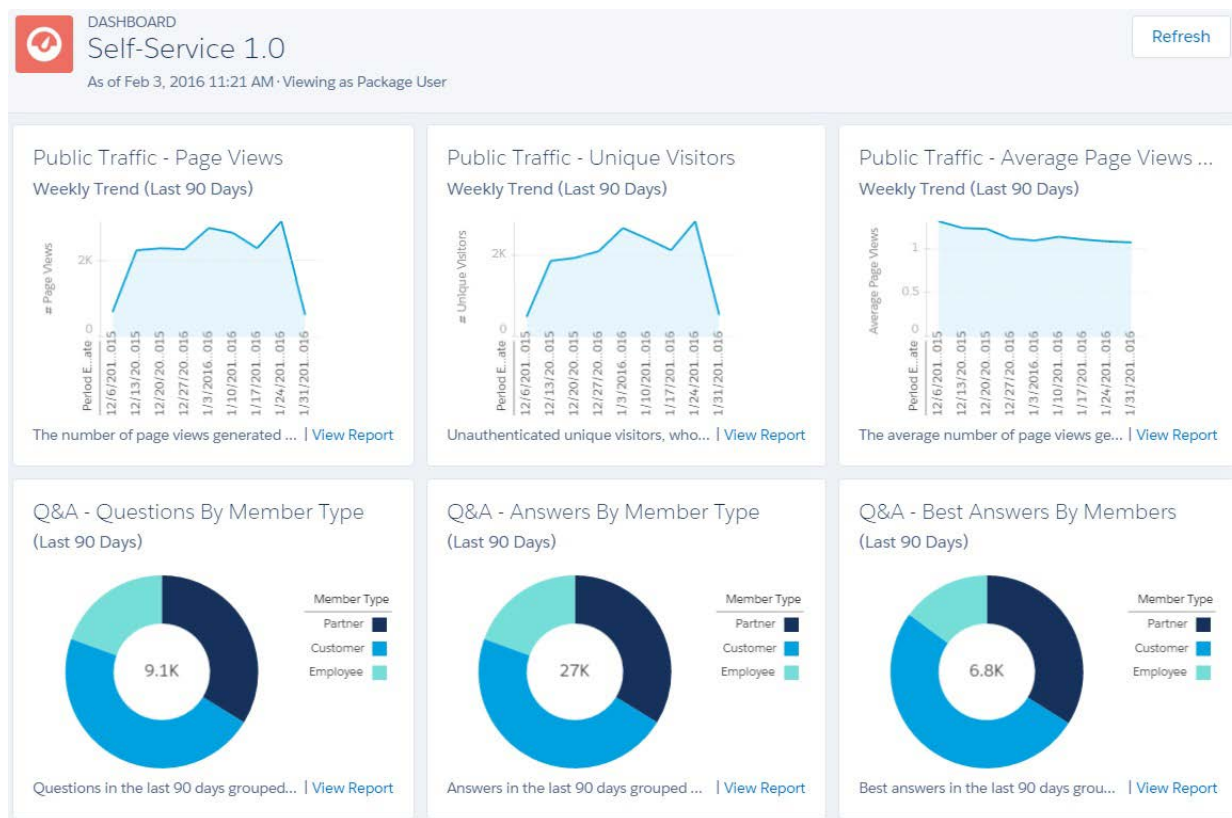
## Self-Service Dashboard and Reports

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?

 **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	✓
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	<p>Reports on the number of page views generated by guest users for the last 90 days in your self-service community.</p> <p> <b>Note:</b> The number of page views might not match other analytics tools, as all tools use different methods for counting page views.</p>	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	✓

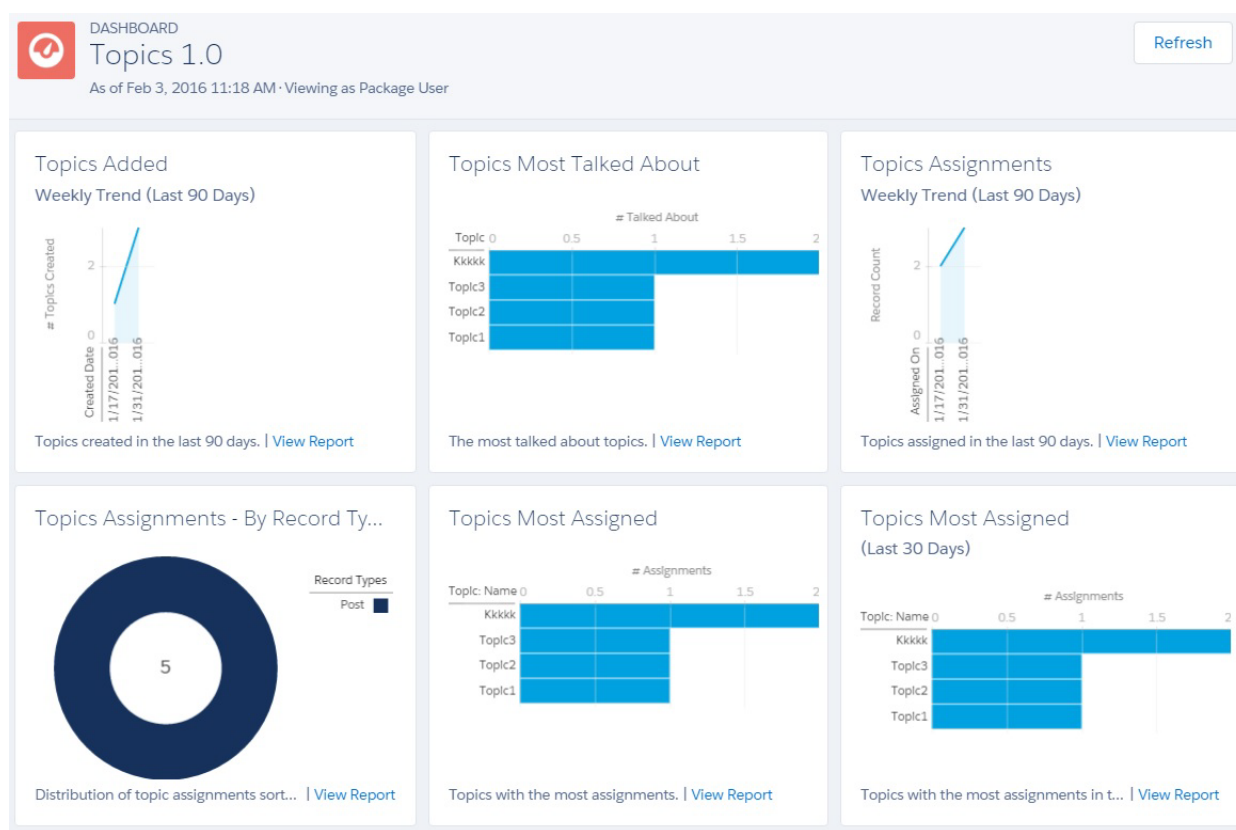
## Topics Dashboard and Reports

Use the Topics dashboard to track your community topics.

With this dashboard, you can see:

- How are topics trending?
- How many topics are getting assigned?
- Who's assigning topics?
- Which topics are being talked about?

**Important:** This dashboard and its reports are *only* available in the package with Chatter.








Report Name	Description	Custom Report Type	On Dashboard?
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).  <b>Note:</b> You can create values for the Record Types field to map custom objects or other types that are not predefined.	Network Topic Assignments 3.0	
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	

## 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
Cases	Total number of questions that escalated to cases in the last 30 days.  <b>Tip:</b> You can use this report on your <a href="#">Home Dashboards</a> .	Org preference - <a href="#">Enable Question-to-Case in Communities</a>	Network Cases 1.0
Escalated To Case	Questions that have been escalated to cases.  <b>Tip:</b> 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.	Org preference - <a href="#">Enable Question-to-Case in Communities</a>	Network Cases 1.0

Report Name	Description	Requires	Custom Report Type
Escalated To Case Closed	<p>Questions that have been escalated to cases and closed in the last 7 days.</p> <p> <b>Tip:</b> 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.</p>	Org preference - <a href="#">Enable Question-to-Case in Communities</a>	Network Cases 1.0
Messages From New Members	<p>Private messages sent by external users in the last 7 days. This report only includes messages sent by external users who registered in the last 7 days.</p> <p> <b>Tip:</b> We recommend that you add this report to the <b>Moderation Audit Trail</b> folder so you can view this report in Community Management or Community Workspaces.</p>	<p>Org preference - <a href="#">Enable Private Messages</a></p> <p>User permission - "Manage Chatter Messages"</p> <p> <b>Important:</b> You need this user permission to see the report in your org.</p>	Network Private Messages 3.0
Questions Escalated - Monthly Trend	<p>Monthly trending report on questions escalated to cases in your community.</p> <p> <b>Tip:</b> You can use this report on your Community Management Home dashboard or in Community Workspaces under <b>Dashboards &gt; Home</b>.</p>	Org preference - <a href="#">Enable Question-to-Case in Communities</a>	Network Cases 1.0
Questions Escalated - Weekly Trend	<p>Weekly trending report on the number of questions escalated to cases in your community in the last 90 days.</p> <p> <b>Tip:</b> You can use this report on your Community Management Home dashboard or in Community Workspaces under <b>Dashboards &gt; Home</b>.</p>	Org preference - <a href="#">Enable Question-to-Case in Communities</a>	Network Cases 1.0
✦ 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 License 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.



**Important:** These dashboard and reports are *only* available in the package with Chatter.



**Warning:** If you customize these Chatter reports and remove the Networks filter, they will report on Chatter usage across your entire Salesforce org, including usage from your internal org and your communities. If you view these Chatter dashboards or reports from within Community Management or Community Workspaces, only community-specific data is displayed. To create a report that returns data only from your internal org, use the Network: Name less than ! filter.

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
- 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 License 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

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.

**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

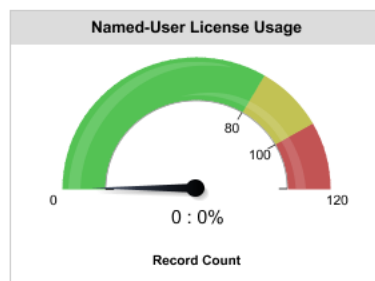
## License Usage 1.0

Find a dashboard... Edit Clone Refresh As of Today at 5:35 AM

### Customer Community Members

# Licenses Purchased:: **0**

The number of Customer Community member-based licenses you've purchased.

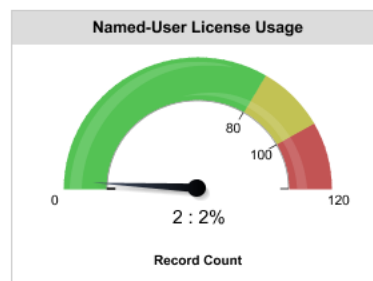


Customer Community license usage. TIP: Adjust this report's gauge thresholds. Replace 100 with the value listed for the # User Licenses Allocated and then adjust your 80% and 120% limits.

### Customer Community Plus Members

# Licenses Purchased:: **500**

The number of Customer Community Plus member-based licenses you've purchased.

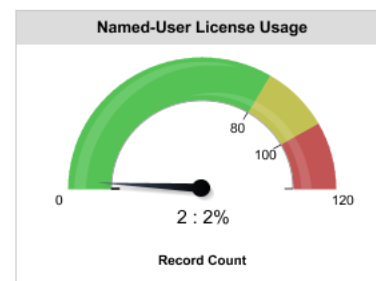


Customer Community Plus license usage. TIP: Adjust this report's gauge thresholds. Replace 100 with the value listed for the # User Licenses Allocated and then adjust your 80% and 120% limits.

### Partner Community Members

# Licenses Purchased:: **2K**

The number of Partner Community member-based licenses you've purchased.

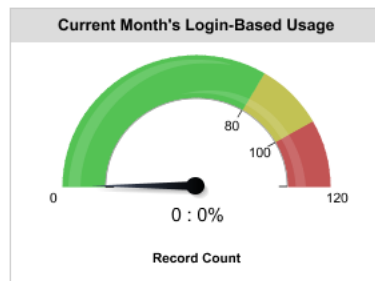


Partner Community license usage. TIP: Adjust this report's gauge thresholds. Replace 100 with the value listed for the # User Licenses Allocated and then adjust your 80% and 120% limits.

### Customer Community Logins

# Monthly Logins Purchased: **0**

The number of Customer Community monthly logins you've purchased.

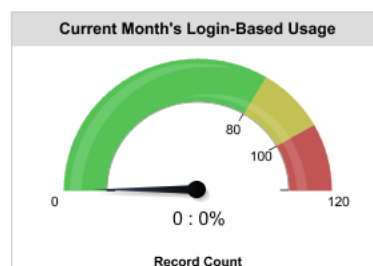


The current month's usage of logins across all communities. TIP: Adjust this report's gauge thresholds. Replace 100 with the value listed for the # Monthly Logins Allocated and then adjust your 80% and 120% limits.

### Customer Community Plus Logins

# Monthly Logins Purchased: **0**

The number of Customer Community Plus monthly logins you've purchased.

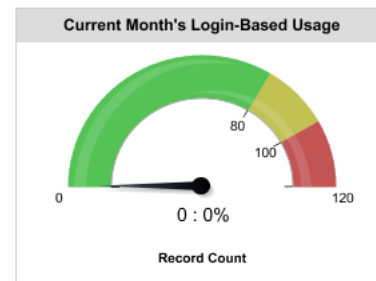


The current month's usage of logins across all communities. TIP: Adjust this report's gauge thresholds. Replace 100 with the value listed for the # Monthly Logins Allocated and then adjust your 80% and 120% limits.

### Partner Community Logins

# Monthly Logins Purchased: **0**

The number of Partner Community monthly logins you've purchased.




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.
























**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.

Component Data	Formatting
Minimum	0
Low Range Color	
Breakpoint 1	80
Middle Range Color	
Breakpoint 2	100
High Range Color	
Maximum	120
Data Labels	<input checked="" type="checkbox"/> Show % <input checked="" type="checkbox"/> Show Total

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.	Network Login History 5.0		
L - CC User-based - Monthly Logins 2.0	Monthly number of logins for users with a Customer Community user-based license in descending order.	Network Login History 5.0		
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 Allect 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		
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		
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		
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		

Report Name	Description	Custom Report Type	Package with Chatter	Package without Chatter
L - # Cust Comm Plus All Alloit Lic 2.0	Number of Customer Community Plus licenses allocated in this Salesforce org across all communities.	Network Login History 5.0	✓	✓
L - # Cust Comm Plus Login Members	Number of users created with the Customer Community Plus login-based license.	Network Login History 5.0	✓	✓
L - # Cust Comm Plus Logins All Alloit 2.0	Number of monthly logins allocated for the Customer Community Plus login-based license in this Salesforce org across all communities.	Network Login History 5.0	✓	✓
L - # Partner Comm All Active Lic	Number of active members on a Partner Community license across all communities.	Network Login History 5.0	✓	✓
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	✓	✓
L - # Partner Comm Logins All Alloit 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	✓	✓
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.	Network Login History 5.0	✓	✓
	 <b>Important:</b> To use this report, you must specify your license limits.			
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.	Network Login History 5.0	✓	✓
	 <b>Important:</b> To use this report, you must 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.   <b>Important:</b> To use this report, you must specify your license limits.	Network Login History 5.0		
L - Member Distribution By License Type	The distribution of members by license type: member-based or login-based.	Network Login History 5.0		
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.   <b>Important:</b> To use this report, you must specify your license limits.	Network Login History 5.0		
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.   <b>Important:</b> To use this report, you must specify your license limits.	Network Login History 5.0		
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		
L - Public Page Views - Monthly Trend	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**.

### EDITIONS








Available in: Salesforce Classic and Lightning Experience

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


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 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.

Network Members Fields (Page 1/4)	
About Me	Active
Active Org Ac...	Address
Admin Info Em...	Alias
Allow Forecas...	Cell
Chatter Adopt...	Chatter Adopt...
Chatter Email...	City
Company Name	Country
Created Date	Data.com Mont...

 **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.		
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.		
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).		
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.		

Custom Report Type Name	Description	Package with Chatter	Package without Chatter
Chatter Topics 1.0	Provides information on trending topics, topic assigners, and more.	✓	
Chatter Unique Contributor Daily Metrics 1.0	Provides information on daily unique visitors across groups and user profiles in your organization.	✓	
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).	✓	
Community Searches 2.0	Provides information about community's search behavior.	✓	✓
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.	✓	
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).	✓	
Network Cases 1.0	Provides information about cases in your Salesforce org.	✓	
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.	✓	✓
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).	✓	
Network Groups Q & A Activity 1.0	Provides information about your community groups' question and answer activities.	✓	
Network Login History 5.0	Provides detailed metrics about the external users (partners or customers) logging into a community. This custom report	✓	✓

Custom Report Type Name	Description	Package with Chatter	Package without Chatter
	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)		
Network Member Activity 1.0	Provides high-level metrics about community member adoption and engagement.	✓	
Network Members 3.0	Provides information on community members. The Network Members entity exposes all user record fields.	✓	✓
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.	✓	✓
Network Frozen Members 2.0	Provides information about all your community's frozen members.	✓	
Network Moderation Flagged Direct Messages 1.0	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.	✓	
Network Moderation Flagged Files 2.0	Provides information about all your community's files which are flagged by the users.	✓	
Network Moderation Flagged Messages 2.0	Provides information about all your community's Chatter messages which are flagged by the users.	✓	
 <b>Note:</b> This report has been enhanced for this version			
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.	✓	
Network Private Messages 3.0	Provides information on private messages sent in a community, including who sent them.	✓	
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.	✓	✓

Custom Report Type Name	Description	Package with Chatter	Package without Chatter
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.	✓	
Network Topics 3.0	Provides information on trending topics, topic assignments, topic assigners, and more.	✓	
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).	✓	
Network User Licenses 1.0	<p>Provides information about community user license usage.</p> <p>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.</p> <p>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).</p>	✓	✓
✦ Network User Participation Daily Metrics	Provides information about whether a user is a contributor or an observer in a community	✓	
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.

### EDITIONS

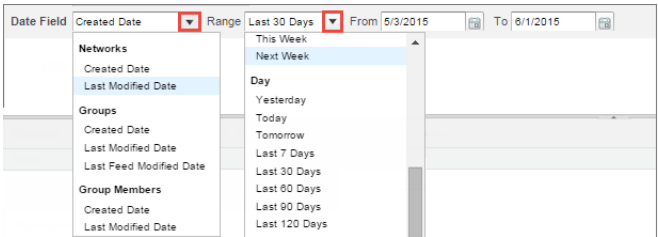
Available in: Salesforce Classic and Lightning Experience

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

## 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

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.

### 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.

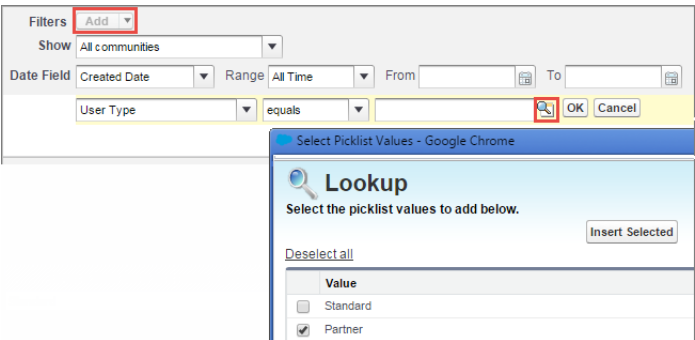
For more information, see [Group Your Report Data](#).

### 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

#### EDITIONS

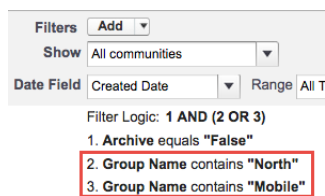
Available in: Salesforce Classic and Lightning Experience

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

#### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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



Filters **Add** ▼

Show **All communities** ▼

Date Field **Created Date** ▼ Range **All T**

Filter Logic: **1 AND (2 OR 3)**

1. Archive equals "False"
2. Group Name contains "North"
3. Group Name contains "Mobile"

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.

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## 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

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<sup>1</sup> You might have an older version of this folder called Communities Dashboards 2.0.

<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 Allocated (replaced with 2.0 version)
- L - # Cust Comm Plus All Allocated Lic
- L - # Cust Comm Plus Logins All Allocated (replaced with 2.0 version)
- L - # Partner Comm All Allocated Lic
- L - # Partner Comm Logins All Allocated (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>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>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>5</sup> Only unsupported in the package with Chatter. This report still remains in the package without Chatter.

<sup>6</sup> Only unsupported in the package with Chatter. This report still remains in the package without Chatter.


<sup>7</sup> 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 Direct Messages 1.0 (replaced by 2.0 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

---

<sup>8</sup> This entire folder and its contents are unsupported.

<sup>9</sup> The contents of this folder were moved to the Moderation Audit Trail folder.

<sup>10</sup> This entire folder and its contents are unsupported.

- Questions With Answers From New Members (replaced with 3.0 version)
- 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

## Service Community Scorecard

Track member use, service metrics, and search activity using the Service Community Scorecard.

Understanding the health of your self-service community takes more than just keeping up with spam. Healthy communities allow for effective collaboration, provide quick resolutions to issues, and are full of engaged, active members. The Service Community Scorecard helps you track all this information in one place. To access the Service Community Scorecard, go to **Dashboards > Home** in Community Management or Community Workspaces.

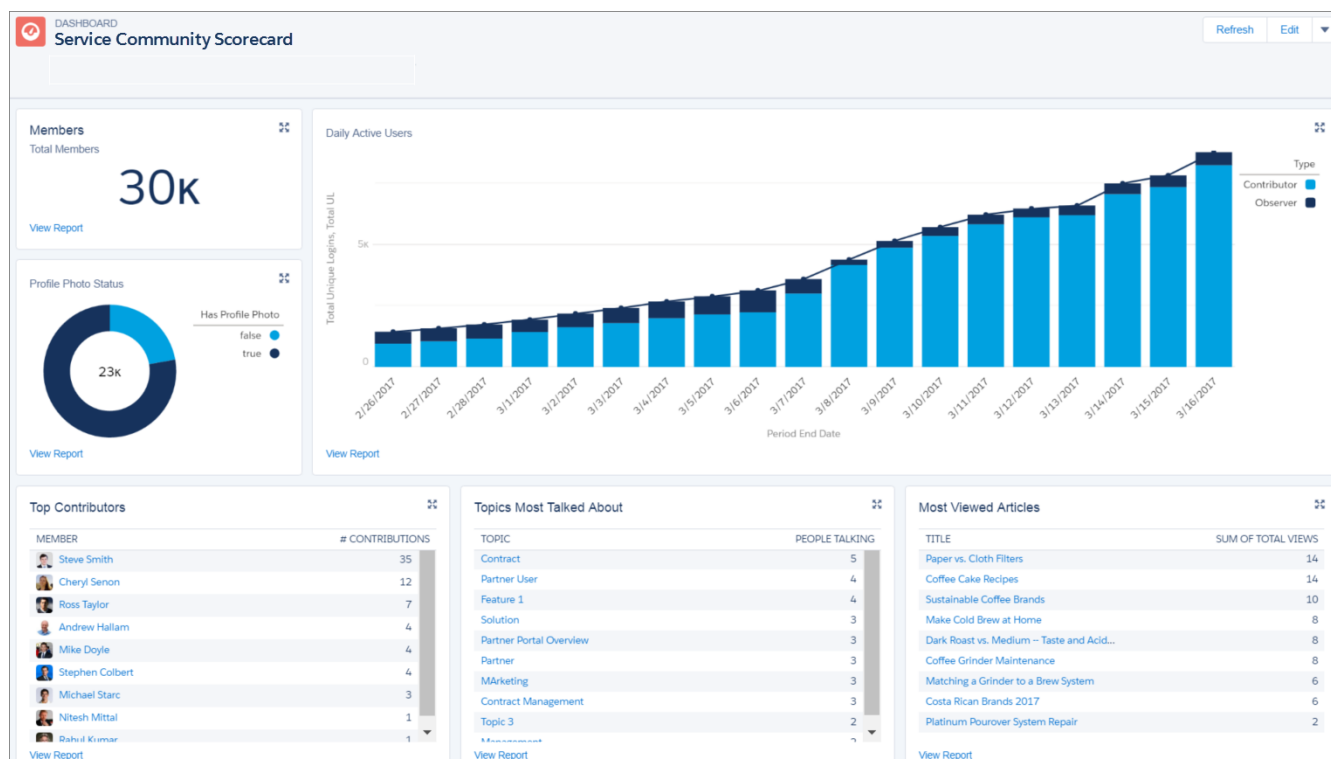
### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

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<sup>11</sup> This entire folder and its contents are unsupported.



The Community Service Scorecard is available on the AppExchange through the Summer '17 Community Management Package. If it's your first time installing the package, the Service Community Scorecard automatically shows up in **Dashboard > Home** in Community Management or Community Workspaces. If you've installed a previous version of the package, you need to manually map the Home dashboard to the Service Community Scorecard from **Dashboards > Settings**. Click the down arrow to the right of the dashboard mapped to Home and select the Service Community Scorecard.


Perhaps your employee or partner community tracks different information? You can customize and rename your scorecard. Go to your internal org and click the **Dashboard** tab. Search for Service Community Scorecard and click **Edit** to add or remove reports or change the name of your scorecard.

 **Note:** The "Manage Dashboards" and "View All Data" permissions are required to edit this dashboard.

Visit the AppExchange to install or upgrade your Community Management Package. The Summer '17 version of the package is available shortly after the release.

# Set Up Report Management for External Users—Create and Edit Reports

Community partner and customer users can create and edit reports in their own personal folder or in a privately shared folder if they have sufficient permissions. You can grant partner and customer users permissions to create and edit reports through their profiles or by using permission sets. After you grant the required permissions, they can use the drag-and-drop Report Builder tool.

 **Important:** If your organization existed before the Summer '13 release, you must first turn on enhanced sharing for reports and dashboards before granting external users permissions. See [Analytics Folder Sharing](#).

To create, customize, and delete reports, external users must use the Report Builder tool.


Data visibility is based on two main things: the user role the partner or customer belongs to and your organization's sharing rules. Your organization's field-level security is respected, meaning that if a field is not visible for external users, a partner or customer user won't see it in Report Builder.

1. To allow external users to create and edit reports, turn on the "Create and Customize Reports," "Report Builder," and "Edit My Reports" permissions through custom profiles or permission sets. If you want external users to export report data, also assign them "Export Reports" permission. In Setup, enter *Permission Sets* in the *Quick Find* box, then select **Permission Sets** or **Profiles**. Assign the following permissions:

### External User Permissions Needed to Create and Edit Reports

To create, customize, and delete reports in a personal folder:	"Create and Customize Reports" AND "Report Builder"
To create, customize and delete their own reports in a privately shared folder with Viewer access:	"Edit My Reports" AND "Report Builder"
To export report data:	"Export Reports"

You can give permission to create and edit reports to all role-based external users with licenses such as Customer Community Plus and Partner Community. You can also give permission to all legacy role-based portal licenses such as Customer Portal and Gold Partner.

-  **Note:**
- These permissions aren't available to high-volume user licenses, such as Customer Community, High Volume Customer Portal, Service Cloud Portal, and Authenticated Website.
  - External users with legacy portal licenses can create and edit reports in communities, but not in portals.

2. If you want your external users to create or edit reports in a privately shared folder, grant them "Viewer" access on the folder.

On the **Reports** tab in the Folders view, click  next to the folder you want to share, then select **Share**.

-  **Note:** Partner and customer users can't create, edit, or view reports in the Unfiled Public Reports folder.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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USER PERMISSIONS

To create permission sets or enable custom permissions in profiles:

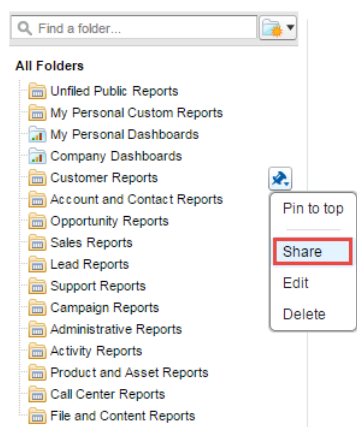
- Manage Profiles and Permission Sets

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




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**.

 **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. <sup>1</sup>
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 <code>Audited Object</code>

### EDITIONS


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High-level usage	Primary Object > B (Child Object) > C (Child Object, If Applicable)	Description
		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 Networks > Network Moderations > Feed Posts Networks > Network Moderations > Feed Comments Networks > Network Moderations > Private Messages	Create reports on content that is currently flagged in your community. These reports allow you to see the actual contents of the flagged item. For example, you can see the contents of a flagged private message to easily determine if the message is spam.
Moderation	Networks > Unpublished Feed Entities > Feed Posts	Create report on posts that are pending review and approval.
Public Activity	Networks > Network Public Usage Daily Metrics	Create reports on the daily public community page views and unique visitors.
Recommendations	Networks > Recommendation Metric	Create reports on custom recommendation usage in your community.
Topic Activity	Networks > Topics	Create reports on the topic activity in your community.
Topic Activity	Networks > Topic Assignments	Create reports on the topic assignments in your community.
User Activity	Networks > Network Activity Daily Metrics	Create reports on the daily number of posts and comments by member type.
User Activity	Networks > Network Members > Login History	Create reports on community login activity. This report only includes direct logins to the community. If a user logs in to an org and then switches to a community, their login activity isn't included.
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.

High-level usage	Primary Object > B (Child Object) > C (Child Object, If Applicable)	Description
User Profile Photos	Networks > Network Members	To report on user profiles with or without photos, filter the report by <code>Has Profile Photo</code> (on the Network Members object) to equal <code>True</code> or <code>False</code> .

<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™ 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™ 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™ 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™ for Salesforce Communities](#)

Set up Google Analytics to correctly capture usage and page view metrics for Salesforce communities.

[Install Google Analytics™ for Salesforce Communities](#)

Install preconfigured reports that integrate Salesforce community data with Google Analytics.

[Google Analytics™ 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™ 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™ 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

## Enable Google Analytics™ 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.

1. First, let Google Analytics access your data to collect page views. Go to **Settings > Advanced** in Community Builder and enter your Google Analytics ID. For more information about the Google Analytics ID, check the [Google Analytics documentation](#).
2. Then select **Let Google Analytics access your Salesforce data for deeper insights into search activity** to allow Google Analytics to track user types, user IDs, and customer search activity within your community.

### EDITIONS

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### EDITIONS

Available in: Salesforce Classic and Lightning Experience

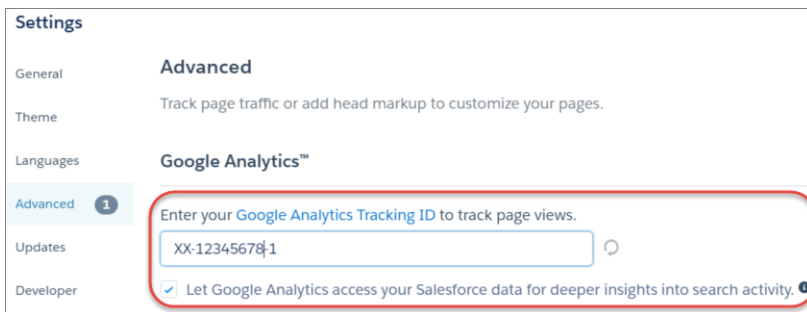
Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions

### USER PERMISSIONS

To customize or publish a community

- Create and Set Up Communities

 **Example:** Google Analytics in Builder.



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™ 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™ for your community](#) to integrate your Salesforce data with Google Analytics before you set up Google Analytics.

1. 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

+ NEW CUSTOM DIMENSION					
Search					
Custom Dimension Name	Index	Scope	Last Changed	State	
User Type	1	Hit	Jan 26, 2017	Active	
Salesforce Object	2	Hit	Jan 26, 2017	Active	

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 442. 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 not 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™ 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.

 **Example:**

**Several object configurations were shared with you.**  
Please choose a view from your Google Analytics account to import these configurations.

Select a view

Custom Reports

☒Page Views by New and Returning Users

☒Page Views by Salesforce Object

☒Page Views by User Type

☒Search Activity

☒Contact Support Page Activity

Dashboards


☒Search Activity

☒Page Views

☒Contact Support Page Activity

Create

Cancel

 **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.

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### USER PERMISSIONS

To customize or publish a community

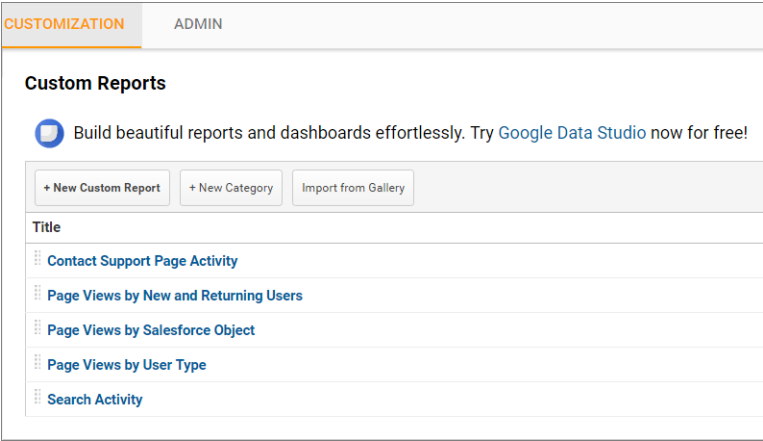
- Create and Set Up Communities

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# Google Analytics™ 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

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### 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.

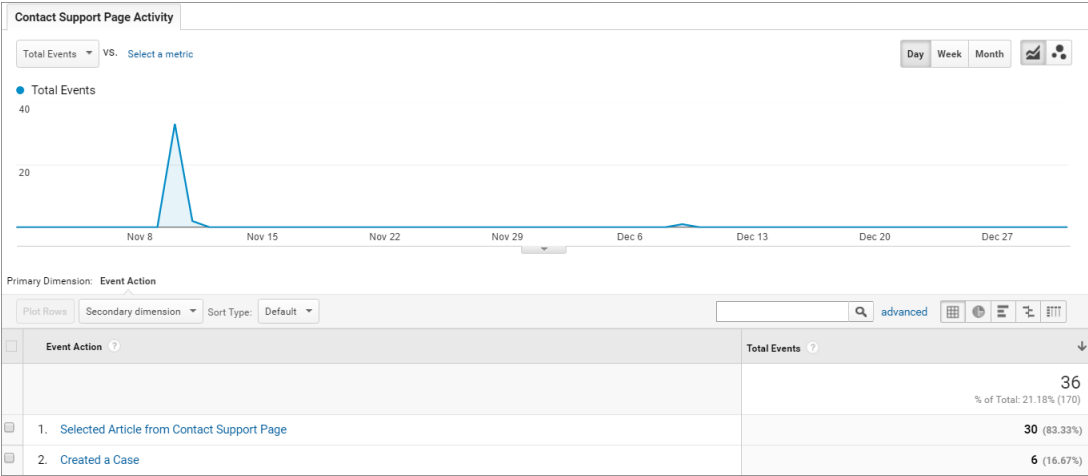
When a customer goes to the Contact Support page, they typically have a specific issue that they need help with right away. The customer has the option of entering their question into a search box and either selecting a recommended article or opening up a customer support case. The Contact Support Page 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

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



### 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.

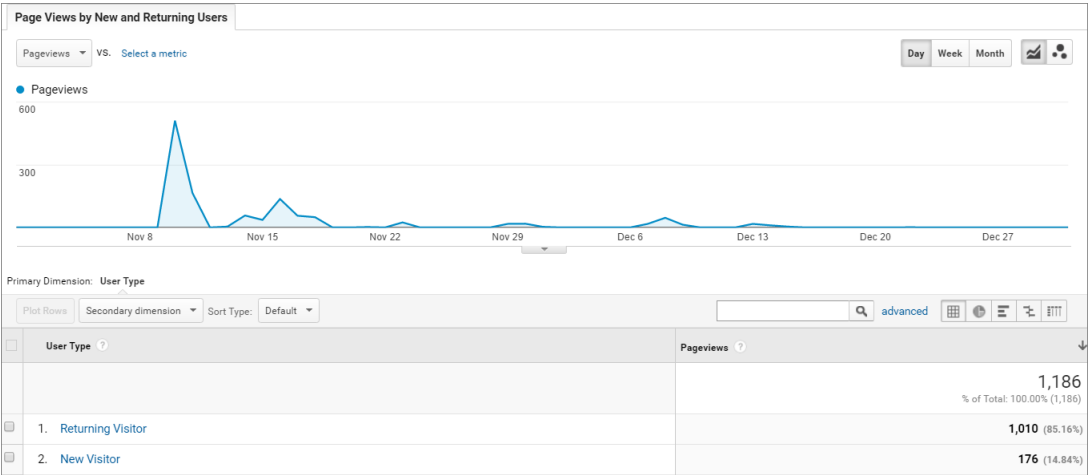
You can drill into the report to:

- 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

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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



Page Views by Salesforce Object Report

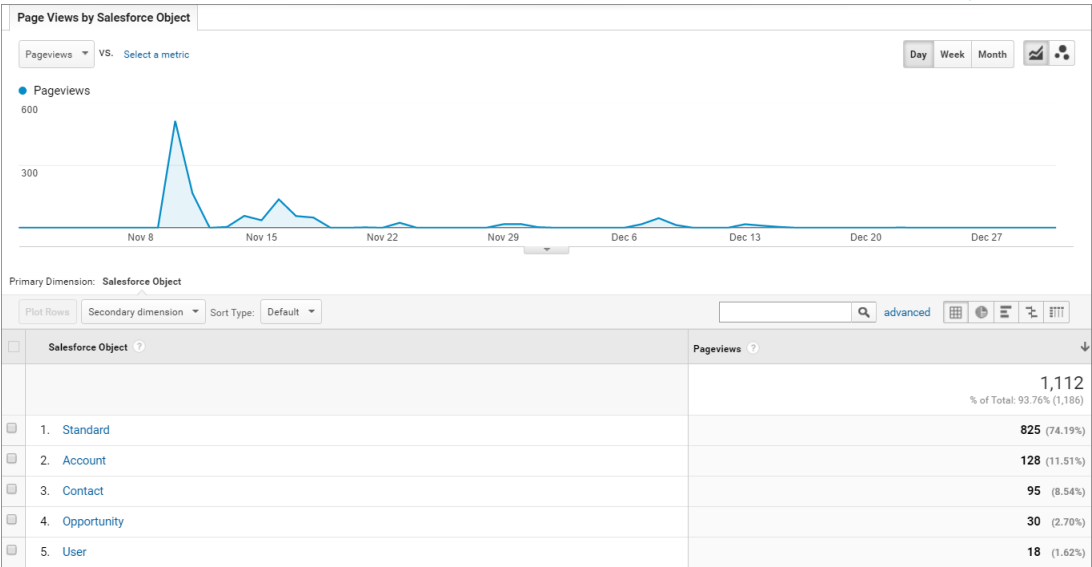
The Page Views by Salesforce Object report tracks how many times an object page is viewed. You can drill into the report to:


- 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

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



 **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.

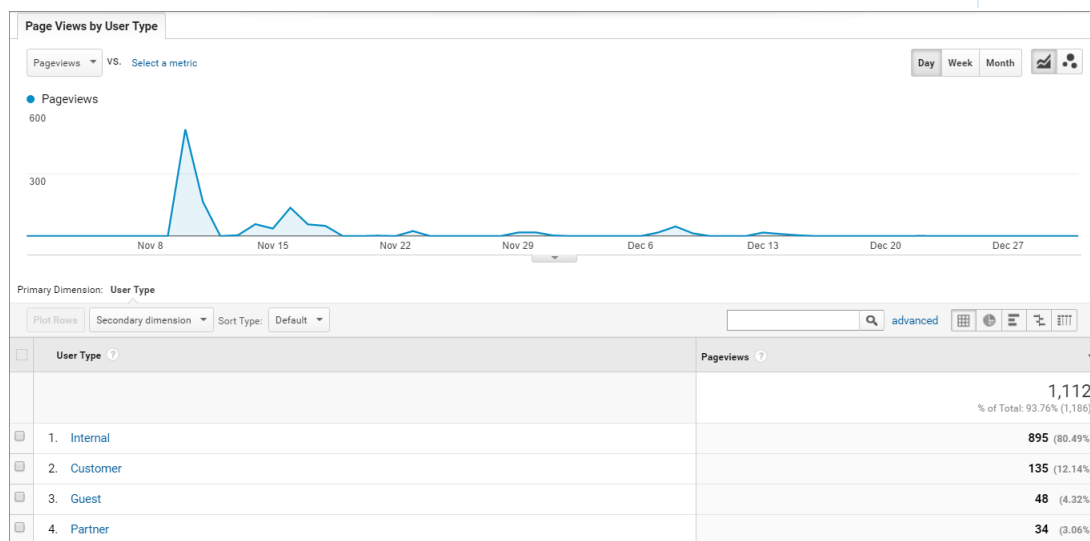
You can drill into the report to:

- Select the user type you want to report on
- Get more information about the page, such as page title and URL

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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



## 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.

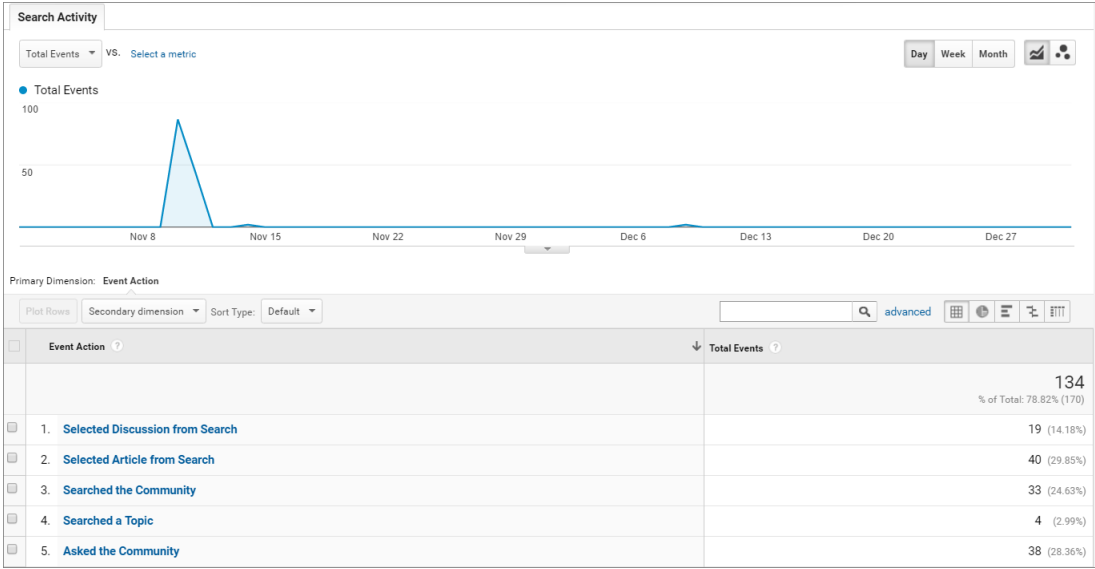
The Search Activity report tracks which action the customer takes from the page that they begin their search on. You can drill into the report to:

- Identify which search terms are being used with each action
- Track how many times a search term is being used

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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



## Google Analytics™ 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.

### 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

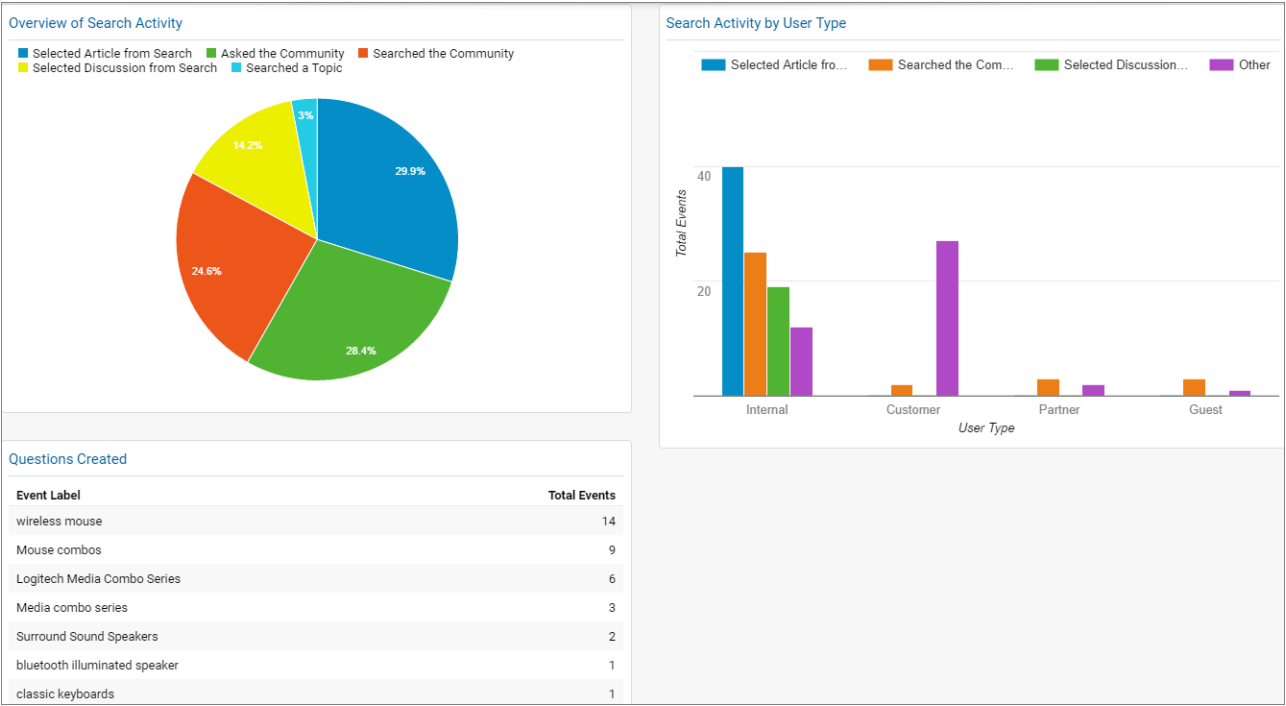
Available in: Salesforce Classic and Lightning Experience

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

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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



## Contact Support Page Activity Dashboard

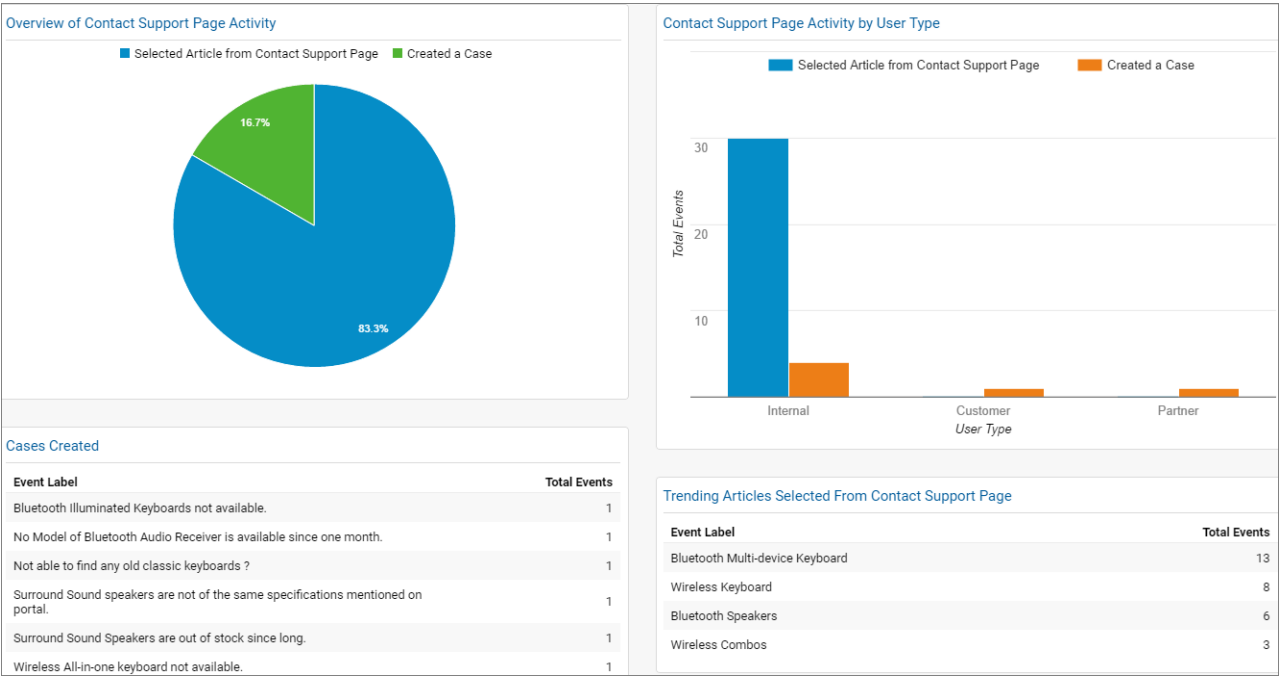
The Contact Support Page Activity dashboard represents the activity on the Contact Support page. You can get the following information from this dashboard:


- 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

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



 **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.

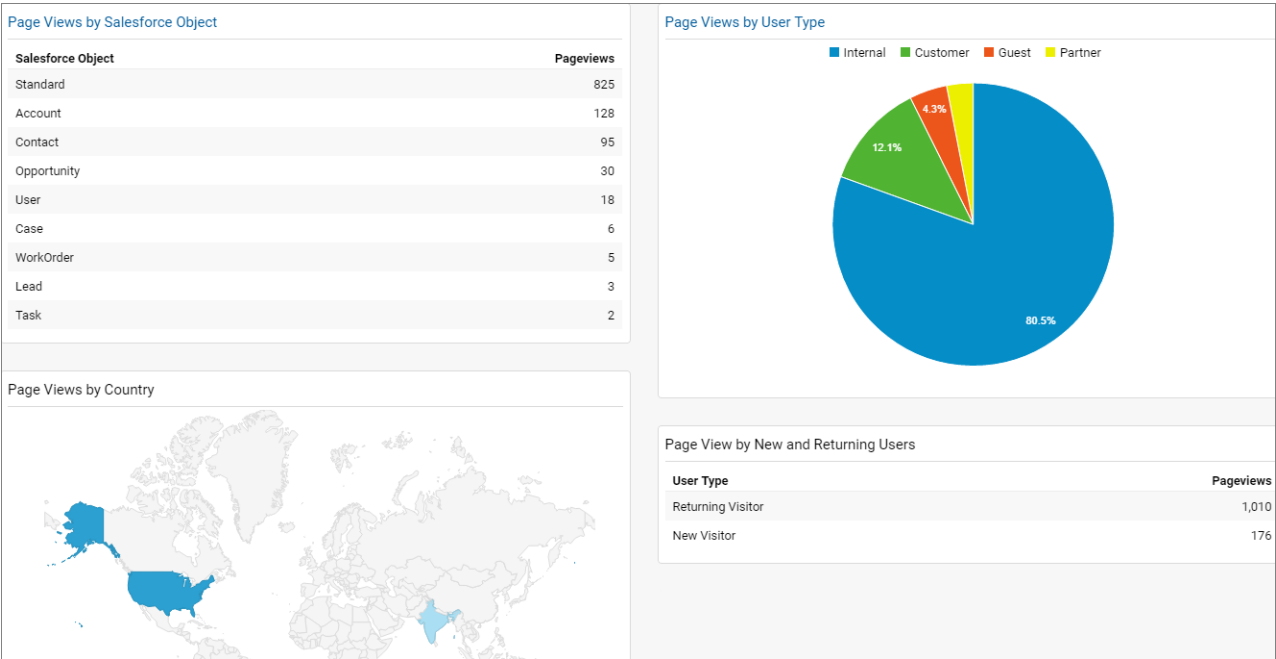
Track page views:

- By Salesforce object
- By User Type
- By location
- By new versus returning users

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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



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

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



## Manage Partner Relationships in Communities


Communities is a powerful tool for partner relationship management. Invite partners to a community and share CRM data with them to drive channel sales and marketing. Create a shared pool of leads and pass them to partner users in the community. Configure deal registration to allow partners to submit qualified deals, minimize channel conflict, and get early pipeline visibility. Use the power of Lightning and Salesforce and drive your bottom line together.

 **Note:** If you have an existing partner portal, you can continue to use the portal to collaborate with partners. However, we strongly recommend you migrate your partners to a community. Partner portal licenses can be reused in a partner community.

Salesforce offers a powerful Lightning solution to help you build a partner community with button clicks, and no code: [Partner Central](#). A community allows your partner users to log in to Salesforce through a separate website and access data you've made available only to them. In a partner community, you can:

- Extend Salesforce to securely expose CRM data with partners.
- Recruit, onboard, and educate partners (training and certifications).
- Manage your channel sales with programs, tiers, business plans, and partner scorecards.
- Manage lead distribution, deal registration, and quoting for channel sales.
- Streamline channel marketing with marketing development funds (MDF), marketing campaigns, and co-branded email communications.
- Provide a rich, personalized and mobile-ready experience to drive partner productivity
- Manage, track, and forecast partner sales **alongside** your direct sales in your Salesforce org.

With communities, you can publicly share information that you want all partners to see in a single location. You can also share data privately with specific partner users in the same community and restrict access with the security built into Salesforce.

 **Example:** Here are a few industry examples of how a company can use a community to drive partner sales:

- A technology company can work with resellers to pass leads, register deals, and market products together
- A manufacturer can work with its distributors, wholesalers, and retailers in communities.
- An insurance company can work with independent brokers to track leads and sell insurance products.

SEE ALSO:

[Migrating from Portals to Communities](#)

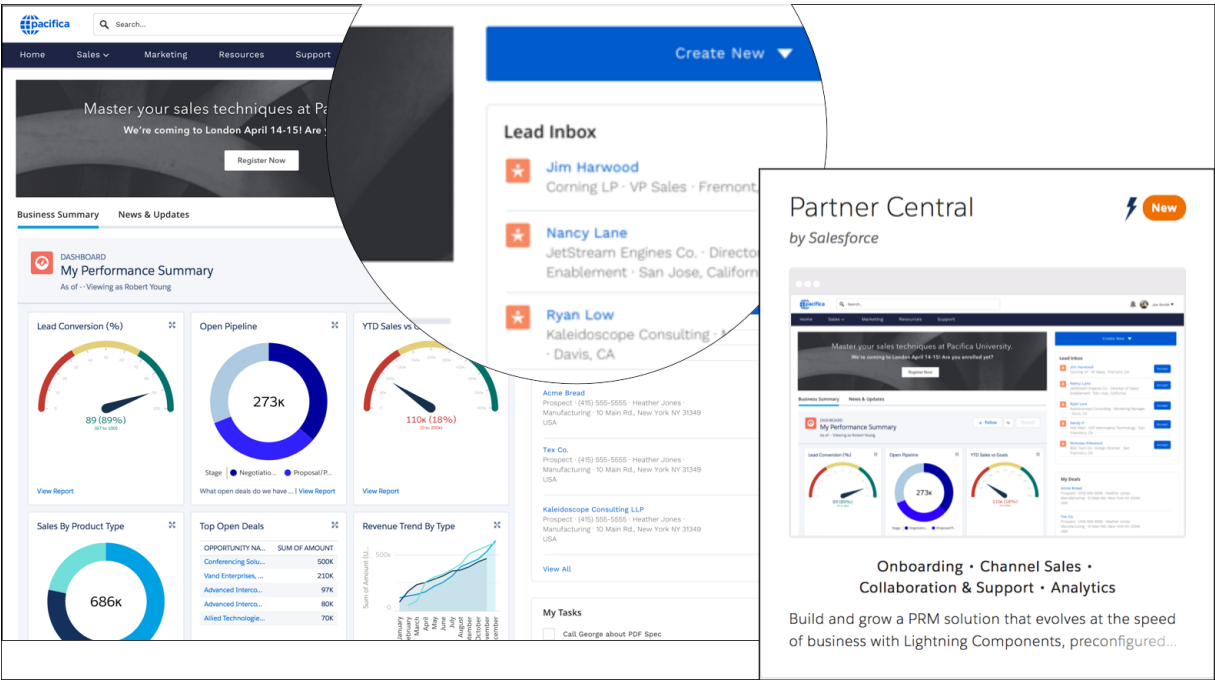
### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

## Partner Central—Build Lightning Partner Communities

Quickly set up a custom, branded space where you can invite your partners and work on driving channel sales and marketing together. The Lightning Partner Central solution is optimized for channel managers and partners to collaborate on and track sales data. A simplified setup combined with rich branding and a responsive UI lets you quickly build an exclusive online experience for your partners.



Partner Central comes predesigned with partner sales workflows in mind so you can build and grow your partner network and bring CRM to your partners in a shared space:

- Use the Lead Inbox component to configure [lead distribution](#)
- Configure deal registration and allow partners to submit qualified leads to beat competition
- Share training material, sales collateral, and other resources
- Map reports and dashboards of your choice to track deal closure, lead activity
- Configure Google Analytics to monitor community activity

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

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

Partner Central is designed with partner sales workflows in mind and comes with components and pages that you can use directly or customize easily.

Get started with your own Lightning partner community! We’ve put together a high-level roadmap—or a recipe, if you will—of the decisions and tasks involved with setting up a community with Partner Central.

Planning	<ul style="list-style-type: none"><li>• <a href="#">What’s Your Partner Community Strategy?</a></li><li>• <a href="#">Buy Partner Licenses</a></li><li>• <a href="#">What Template Can I Use?</a></li><li>• <a href="#">Compare Features Available in Community Templates</a></li><li>• <a href="#">Lightning Communities Limitations</a></li></ul>	Prep Your Salesforce Org for a Partner Community	<ul style="list-style-type: none"><li>• <a href="#">Set Up the Channel Manager Role</a></li><li>• <a href="#">Create Partner Accounts</a></li><li>• <a href="#">Create Partner Users</a></li><li>• <a href="#">Partner Profiles, Roles, and Sharing Considerations</a></li><li>• <a href="#">Super User Access</a></li><li>• <a href="#">Delegated Administration</a></li></ul>
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<i>Set Up a Partner Community</i>	<ul style="list-style-type: none"> <li>• <a href="#">Update Org-Wide Settings</a></li> <li>• <a href="#">Check Out Community Workspaces</a></li> <li>• <a href="#">Create Communities</a></li> <li>• <a href="#">Share More Salesforce Records in Your Community</a></li> </ul>	<i>Advanced PRM and Community Features</i>	<ul style="list-style-type: none"> <li>• <a href="#">Lead Distribution</a></li> <li>• <a href="#">Deal Registration</a></li> <li>• <a href="#">Community Moderation</a></li> <li>• <a href="#">Configure Dashboards to Monitor Your Community</a></li> <li>• <a href="#">Create Pages and Groups Targeted at Specific Audiences</a></li> </ul>
<i>Community Design</i>	<ul style="list-style-type: none"> <li>• <a href="#">Customize Your Community (Builder)</a></li> <li>• <a href="#">Customize Community Pages and Components (Builder)</a></li> <li>• <a href="#">Customize Community Navigation</a></li> <li>• <a href="#">Which Components Can I Use with Partner Central?</a></li> <li>• <a href="#">Customize the Lead Inbox</a></li> <li>• <a href="#">Customize the Quick Create Actions</a></li> <li>• <a href="#">Custom Theme Layouts</a></li> </ul>	<i>Community Reporting</i>	<ul style="list-style-type: none"> <li>• <a href="#">Community reports and dashboards</a></li> <li>• <a href="#">Custom Reports</a></li> <li>• <a href="#">Report Management for Partners</a></li> <li>• <a href="#">AppExchange Reporting Packages for Communities</a></li> <li>• <a href="#">Google Analytics™</a></li> </ul>

## Enable Partner Functionality in Your Org

Buy partner licenses to enable partner functionality in your org. Partner licenses are required to use the Lightning Partner Central community template, set up partner accounts, and create partner users in your org.

When you buy partner licenses, the following functionality is enabled in your org:

- The Partner Central community template.
- The default [Partner User profile](#). You can clone it to create custom partner profiles or extend data access via permission sets.
- Three standard [partner roles](#): Partner User, Partner Manager, Partner Executive. When you create partner accounts, you can associate one of these roles with the partner users.
- A [sharing rule group and category](#) targeted at partner users.
- The **Manage External Account** and **Enable as Partner** buttons on accounts.
- A **Manage External User** and **Enable Partner User** button on contacts.



**Note:** If you have previously purchased partner portal licenses, you already have these features in your org.

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

## Templates Supported for Partner Communities

The choice of template for creating a partner community depends on your company's branding requirements and the development effort you can invest in for the design of your community.

Use Partner Central to use a highly customizable template that uses slick Lightning components, just like Customer Service (Napili). Partner Central is designed with channel sales workflows in mind, and comes with the Lead Inbox component to support lead distribution. You can also configure deal registration to allow partners to submit leads from the community with a few button clicks and no code. Plus, you get the same rich, responsive Lightning look and feel across devices, including mobile devices.

If you prefer the Salesforce Classic look and feel, use the Salesforce Tabs + Visualforce template. This option allows heavy rebranding, but you'll need developers with Visualforce skills.

Still confused? [Compare the features available in all community templates.](#)

### 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?
-  **Note:** If you don't need access to all sales objects, such as opportunities, leads, and campaigns, you can also use Customer Community Plus licenses for partners.
- Can I invite all my partners to the same community or do I need multiple communities?
- What objects do I need to grant permissions for in my partner profiles? Do I need to three roles per account?
- What level of data visibility and privacy do I need for my community?
- Do I want to allow my partners to self-register?

For more ideas on planning your community strategy, check out [this Trailhead module for Communities.](#)


### 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 need to switch to community licenses.

-  **Note:** Starting from Summer '13, portals are no longer available for new Salesforce orgs. Existing organizations using portals can continue to use their partner portals or migrate to communities. If you don't have a partner portal, but want to share records and information with your partners, give Salesforce Communities a try. Contact Salesforce for more information.

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

## Why Migrate from Portals to Communities?

Communities offer all the functionality available in portals and customer portals, plus more features including:

- A rich, responsive, mobile-ready Lightning solution designed with channel sales and marketing workflows in mind: Partner Central

- Build personalized, rich experiences with your company's branding
- Collaborate with your partner users in groups and feeds
- Share files
- Access to reports and dashboards plus the ability to create custom reports for your community
- Single sign-on and login support for multiple authentication providers
- Content moderation, direct messages, and much more
- Single location where you can design, moderate, and manage your community

Plus, we're working round the clock to bring you more features in every release.

See the [Migrating from Portals to Communities](#) guide for more information on how to migrate your portal users and data over to a community.

## If You Continue to Use Partner Portals

All the information about setting up partner accounts, users, portals, and tracking partner sales is available in the [Salesforce Partner Portal Guide](#).

## 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


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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 you [reduce the number of roles to one](#) role: Partner User. To avoid role proliferation, it's better to use one role and [grant super user access](#) to users who need access to other users' data.
2. In Setup, type *Sharing Settings* in the Quick Find/Search box and edit the organization-wide defaults. Set the Default External Access setting to **Private** for all the objects you want to share with your partners.
3. Clone and customize the [Partner User profile](#) per your community's needs and, if necessary, grant extra permissions with a permission set.
4. [Create a partner account](#) for each partner organization you work with. Partner accounts store details about partner users and their sales data.
5. Also, plan how you want to use [sharing rules to share data with partners](#).
6. Add users from each partner company as contacts on the respective partner account.
7. Convert the contacts on the partner account to [partner users](#) and assign a partner license, profile, and role.
8. Optionally, [enable](#) and [grant super user access](#) to partner users if you want them to view data owned by other users in their role hierarchy.
9. If you work with many partner users or don't want to deal with user management for a partner organization, consider [delegating user administration](#).

With that, you're ready to set up a community and assign partner users to it.

## 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 queue for channel managers. You can use this queue for lead assignment rules.


**Create Partner Accounts**

Add each company with which you partner to Salesforce as a business account. We recommend that channel managers create partner accounts so they can view all partner data.

Partner accounts are Salesforce accounts that a channel manager uses to manage partner organizations, partner users, and activities when using a partner community or a partner portal. A channel manager who owns a partner account can access all the data associated with the partner account and the associated partner users.

 **Note:** The partner user role is a subordinate of the account owner's role. All data for the partner user role rolls up to the partner account owner's role. Keep in mind that if you disable a partner user, their partner user role becomes obsolete and their data no longer rolls up to the partner account role.

1. Create a new business account.
2. Click **Manage External Account** and then, click **Enable as Partner**.
3. In the confirmation dialog, select **Yes, I want to enable this account as a Partner Account..**
4. Click **Confirm**.

-  **Note:**
- If your organization has person accounts, they cannot be used as partner accounts. Only business accounts can be used as partner accounts.
  - Partner accounts can't be deleted, but can be [disabled](#).

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.

**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

## Disable Partner Accounts

You can't delete partner accounts, but you can disable them. Disabling a partner account disables partner users associated with the account. We recommend disabling a partner account only if the account was accidentally enabled for community access.


If you choose to disable a partner account:

- Up to 15 active and inactive external users associated with the account are permanently disabled. You also remove them from all communities, groups, teams, permission sets, and sharing rules they're associated with.
  - If there are more than 15 active or inactive external users associated with an account, you can't disable it. Disable the users before disabling the account.
  - Roles and groups associated with the account are permanently deleted and not moved to the Recycle Bin.
1. Go to the account detail page for the account you want to disable.
  2. Click **Manage External Account**, then click **Disable Partner Account**.
  3. Click **OK** to confirm.


If you decide to re-enable the account in the future, you can re-enable individual contacts as partner community users. Re-enabling a contact for a partner community creates a partner user record that is not associated with the previous partner user and role. You can't restore deleted roles and groups.

## Create Partner Users

After you create a partner account, add users to the account as contact records and then convert them to partner users. Partner users are Salesforce users with access to CRM objects such as opportunities, leads, and campaigns. Partner users can access Salesforce data when they're invited a community.


 **Tip:** Before creating partner users, configure your community so your partner users don't log in to your community before it is ready.

1. View the partner account contact you want to convert to a partner user.
2. On the contact detail page, click **Manage External User** and choose **Enable Partner User**.
3. Edit the user record for this partner and assign a partner license, role, and profile.

 **Tip:** You can use a Customer Community Plus license if the user doesn't require access to CRM objects, such as opportunities, leads, and campaigns.

4. Click **Save**.

After you create a partner user, you can edit the partner account and the partner user independently. Changes made to one are not reflected in the other.

 **Tip:** To check or troubleshoot issues with the partner user account, on the contact detail page, click **Manage External User** and choose **Log in to Portal as User**. A new browser window opens and you are logged in to the community as a community user.

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 view accounts:

- Read on accounts

To create accounts:

- Create on accounts

To disable a partner account:

- Manage External Users

### 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.

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.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

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
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

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.



**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.

### 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

Enable Leads for Visualforce Communities

If you are using the Salesforce Tabs + Visualforce template, enable leads for partner users in your community so that they can access and create leads in your communities.

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

1.

Open [Community Workspaces](#) or [Community Management](#).
2.

Click **Administration****Tabs**, and add the **Leads** tab to the list of available tabs in your community.
3.

In Setup, set tab visibility and object permissions. You can either set them on the profile or using a permission set. We recommend using a permission set if you plan to apply these permissions selectively.


a.

If using a permission set, use the following settings for leads:
  - In the Tab Settings, select Available and Visible.
  - In the Object Settings, select “Read,” “Create,” and “Edit.”

b.

If using a profile, such as the Partner User profile, set the leads tab setting to `Default On` and enable the “Read,” “Create,” and “Edit” object permissions for leads.

4.

Optionally, you can assign extra permissions that enable advanced features for your partners. If you plan to apply these permissions to only some of your partner users, we recommend creating separate permissions sets.
-  **Note:** Partner users with legacy portal licenses can use these advanced features in communities, but not in portals.
- | 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 accounts and contacts using the <b>Import My Organization’s Accounts &amp; Contacts</b> link on the Accounts and Contacts tabs in your community. | AND<br>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”                              |
- 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
- 461

## Assign Cases to Partners

Assign cases to partner users so they can view, modify, and update case information.

Before you assign cases to partners, ensure partners have permissions to read and update cases. You can only assign cases that you have access to.

1. On the case detail page, click **[Change]** next to the **Case Owner** field.
2. Select **Partner User** from the Owner drop-down list and enter the name of the partner user.
3. Optionally, select the **Send Notification Email** checkbox to send an email to the new owner.
4. Click **Save**.

The partner user can view and edit the case from their community.



### Note:

- Case comments added by partner community users are public and visible to any user that can view the case.
- You can create case assignment and escalation rules that automatically assign cases to partner users based on criteria that you define.

## Assign Tasks and Events to Partners

If you have added a calendar to your community, you can add events to it. Partner users with the Edit Events permission can create and edit their own events. Also, with the appropriate field-level security settings, partner users can view and create activities related to leads or opportunities.



**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 cases to partners:

- Edit on cases

AND

Transfer Cases or  
Transfer Record

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

### USER PERMISSIONS

To assign events to partner users:

- Edit Events

## Grant Super User Access to a Partner User

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

A few things to consider before you grant super user access to users.

- Enable Partner Super User Access in your Communities Settings before granting access to individual partner users.
- Partner super user access applies only to cases, leads, custom objects, and opportunities.

Partner Super Users with Role	Can Access Data Owned By or Shared With
Partner Executive	<ul style="list-style-type: none"><li>– All partner users and partner super users in the same role</li><li>– Manager and User roles below them in the hierarchy</li></ul>
Partner Manager	<ul style="list-style-type: none"><li>– All partner users and partner super users in the same role</li><li>– User roles below them in the hierarchy</li></ul>
Partner User	All partner users and partner super users in the same role (User roles only)

- Use this information to grant super user access to users with Partner Community licenses.

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

This grants super user access to the user with a Partner Community license. You can also grant super user access to users with [Customer Community Plus licenses](#).

SEE ALSO:

- [Grant Super User Access to Customer Users in Your Community](#)
- [Enable Super User Access for Your Communities](#)

## Delegate External User Administration

If your partner organizations have a large number of users, you can delegate user administration to external users.

Available in: Salesforce Classic

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

### 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

### USER PERMISSIONS

To manage external users:

- Manage External Users

To create, edit, and delete profiles:

- Manage Profiles and Permission Sets

External users who are delegated administrators can:

- Create and edit external user records
- Generate new passwords for external users
- Deactivate existing external users

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

 **Note:** The options to reset passwords and deactivate existing external users is only available for delegated admins of communities using the Salesforce Tabs + Visualforce template.

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](#)

## Lead Distribution and Deal Registration

Salesforce Communities provides an incredibly robust and flexible set of tools to manage both inbound and outbound leads. Use Partner Central to implement lead distribution, lead monitoring, and deal registration with a few clicks of a button.

Lead distribution is the practice of managing and maturing both inbound and outbound sales leads with channel partners who are selling on your behalf. Many companies sell their products through partners. With the lead distribution process, companies source leads and pass them to their partners for follow-up and sales. Lead distribution is also known as lead pass.

Other companies rely on their partners to source leads and register them with the company. This process is known as deal registration. The channel manager checks in the Salesforce org to make sure that the submitted lead does not create channel conflict with other partners.

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

### IN THIS SECTION:

#### [Assign Leads to Partners](#)

You can assign leads to partners or allow partners to drive their own lead queue.

#### [Configure Lead Distribution in Partner Central](#)

Automatically pass on leads acquired from your web site, marketing campaigns, or referral programs using lead distribution. Partner Central lets you share a common pool of leads with your channel partners in a partner community using the lead inbox.

#### [Configure Deal Registration in Partner Central](#)

Deal registration programs involve resellers registering deals with their vendor. Vendors in turn provide extra margins to the reseller for providing early pipeline visibility for these deals and keeping out competitors. Once a deal is registered, other resellers or your direct sales team can't compete for the registered deal.

## Assign Leads to Partners

You can assign leads to partners or allow partners to drive their own lead queue.

You can:

- **Directly assign leads:** Assign each lead to an individual partner user.
- **Configure lead distribution:** Assign leads to a lead queue and allow partner users to claim leads from the queue. The native Partner Central community template provides the lead inbox component that you can use to pass leads to partners. Use lead assignment rules to automatically assign leads to partner users or queues based on certain properties of those leads.



**Note:** User actions in a community don't trigger assignment rules.

- **Configure deal registration:** Allow partners to submit qualified or mature leads to get ahead of competitors.

Assigning a lead to a partner user or partner lead queue is just like assigning a lead to any other user or queue. Leads assigned directly to a user or a queue that is not part of the lead pool are shown on the community's Leads page or tab. The partner user can see leads by selecting the appropriate list view. Until a partner user has reviewed a lead, it displays in bold, and is in the My Unread Leads list view.

### 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

## Configure Lead Distribution in Partner Central

Automatically pass on leads acquired from your web site, marketing campaigns, or referral programs using lead distribution. Partner Central lets you share a common pool of leads with your channel partners in a partner community using the lead inbox.

While companies can choose to configure lead distribution in multiple ways, one approach is to create a shared queue and list view of leads, and use assignment rules to automatically pass leads to partners in the lead inbox. Use Salesforce CRM capabilities such as lead page layouts, lead record types, and assignment rules to automate the process. Partner users can accept the leads they're assigned from the lead inbox in the partner community.

Configure lead distribution for your partner community for:

- Automated routing of company-sourced leads to channel partners
- Criteria-based lead assignment
- Increased likelihood of lead conversion
- Automated handling of dead or dormant leads

Configuring lead distribution for your Partner Central community involves the following steps.

### IN THIS SECTION:

#### [Create a Lead Process for Lead Distribution](#)

A lead process allows you to define or customize status values or stages for leads.

#### [Create a Queue for Lead Distribution](#)

Create a shared queue of leads and add partners to the queue. A queue is a special type of list view that you can quickly share with multiple users, groups, and roles. In fact, creating a queue automatically creates a list view in your org. Queues and their corresponding list views both have visibility settings that allow you to share contents with partner users in your community.

#### [Create Page Layouts for Lead Distribution](#)

Use page layouts to control field visibility and behavior for different types of users and sales processes. There are likely fields on the deal registration that the company may not wish to expose to partners.

#### [Create Lead Record Types for Lead Distribution](#)

Create a lead record to track sales leads that you pass to partner users. Record types help you differentiate between sales leads and registered deals, assign specific page layouts for different processes, and simplify reporting for each type of record.

#### [Create Assignment Rules for Lead Distribution](#)

Assignment rules allow you to automatically apply criteria to sort, queue, or act on leads. For example, use assignment rules to automatically assign leads to the lead inbox queue for Partner Central.

#### [Customize Partner Central for Lead Distribution](#)

Partner Central comes predesigned to support lead distribution. Verify that the Lead Inbox component works with your lead queue and list view and test the lead distribution process.

### EDITIONS


Available in: Salesforce Classic and Lightning Experience

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

## Create a Lead Process for Lead Distribution

A lead process allows you to define or customize status values or stages for leads.

Create a process called Lead Distribution and define the statuses that the lead can be in. When you select status values for a process, think of all the stages a lead goes through in the process.

 **Tip:** To use more values than the master process record provides, [customize the Lead Status picklist values](#) for leads before you create the lead process.

1. From Setup, enter *Processes* in the Quick Find box.
2. To [create a lead process](#), such as for lead distribution, select **Lead Processes**.
3. Select the stages best suited to the lead and your business needs.
4. Save the process.

## Create a Queue for Lead Distribution

Create a shared queue of leads and add partners to the queue. A queue is a special type of list view that you can quickly share with multiple users, groups, and roles. In fact, creating a queue automatically creates a list view in your org. Queues and their corresponding list views both have visibility settings that allow you to share contents with partner users in your community.

1. From Setup, enter *Queues* in the Quick Find box, then select **Queues**.
2. [Create a queue](#) to queue leads for the lead inbox. Let's call this Lead Inbox Queue or an intuitive name of your choice.
3. On the queue detail page, under Queue Members, add the partner users you want to pass leads to. You can set the visibility settings by profiles, roles, or users.
4. Save the queue, which also creates a list view by the same name.
5. Next, go to the Leads object home in your org. From the Views drop-down list, select the list view with the same name as the queue and edit the list view.

 **Note:** You can't edit list views in Lightning Experience.

6. In the Step 4: Restrict Visibility section, set visibility preferences. For example, to share the queue with all partners, search by and share the list view with the All Partner Users group and save.

In Partner Central communities, you can select this list view to display in the lead inbox in your community. You can create and share multiple queues and the corresponding list views with partner users. Partner users with permissions to access leads, queues, and the corresponding list views can see all lead list views and switch between them.

SEE ALSO:

[Create Queues](#)

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

### USER PERMISSIONS

To create processes:

- Customize Application

### EDITIONS

Available in: Salesforce Classic

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

### USER PERMISSIONS

To create and change queues:

- Customize Application

AND

Manage Public List Views

To change lead list view visibility:

- Read on leads

AND

Create and Customize List Views

To create, edit, or delete public list views:

- Manage Public List Views

## Create Page Layouts for Lead Distribution

Use page layouts to control field visibility and behavior for different types of users and sales processes. There are likely fields on the deal registration that the company may not wish to expose to partners.

Create two page layouts: one for the channel manager and partner profiles in your partner community.

1. From Setup, enter *Leads* in the Quick Find box, then select **Page Layouts** under Leads.
2. Create a lead [page layout](#) for partner users by cloning the master lead layout. Let's call this **Lead Distribution - <User Profile>**.
3. Modify the page layout to add, remove, or modify the behavior of fields, action buttons, related lists, and layouts based on who the layout is for. Typically, channel managers see more data than partner users.
4. Save the page layout.
5. Repeat for channel manager profiles.

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

### USER PERMISSIONS

To create or customize page layouts:

- Customize Application

## Create Lead Record Types for Lead Distribution

Create a lead record to track sales leads that you pass to partner users. Record types help you differentiate between sales leads and registered deals, assign specific page layouts for different processes, and simplify reporting for each type of record.

 **Note:** Creating a lead record type requires a [lead process](#) and a [lead page layout](#).

Lead distribution is used for managing outbound leads that your company passes to your partners. Deal registration, on the other hand, allows partners to submit leads early on so they can get ahead of their competition. Both channel managers and partner users see both lead record types, but channel managers typically require more visibility and control over the data. Define lead page layouts with both channel managers and partner users needs in mind. You can assign page layouts to profiles for each lead record type you create.

1. From Setup, enter *Leads* in the Quick Find box, then select **Record Types** under Leads.
2. Create a record type to track leads you pass to partners for lead distribution. Let's call this **Sales Lead**.  
For deal registration, create a separate record type called **Deal Registration**.
3. Activate the record type and assign it to the appropriate partner and channel manager profiles for your community.
4. Assign page layouts for the partner and channel manager profiles.
5. Edit the picklist values for the Lead Source record type. Include values that let you track inbound leads from deal registration (from partners) separately from outbound sales leads (passed to partners).

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

## Create Assignment Rules for Lead Distribution

Assignment rules allow you to automatically apply criteria to sort, queue, or act on leads. For example, use assignment rules to automatically assign leads to the lead inbox queue for Partner Central.

For lead distribution, use assignment rules to define the criteria by which you want to distribute your leads, such as partner tier, geography, or specialization.

1. From Setup, enter *Leads* in the Quick Find box, then select **Lead Assignment Rules**.
2. Create a lead assignment rule, let's call this All Channel Sales Leads.
3. Create rules to filter leads by record field values or user criteria and assign them to the lead inbox queue.



**Tip:** You can also create rules to directly assign leads to partner users.

4. To send an email notification when a lead is assigned to the queue, select an email template.



**Tip:** You can [create custom templates for partner email notifications](#).

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

## Customize Partner Central for Lead Distribution

Partner Central comes predesigned to support lead distribution. Verify that the Lead Inbox component works with your lead queue and list view and test the lead distribution process.

1. In your Partner Central community, go to the Home page in Community Builder.
2. Click the Lead Inbox component and select the lead list view you want to display and link to. Configure other properties in the Property Editor.
3. To save your changes, publish the community.
4. Log in as a partner to test the lead distribution process.
  - Create a few test leads that match the assignment rules for the lead queue.
  - Make sure that the leads show up in the lead inbox queue and list view.
  - Accept a lead. Accepting a lead makes the partner the owner of the lead.
  - Verify that the lead shows up in the partners list view.

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

## Configure Deal Registration in Partner Central

Deal registration programs involve resellers registering deals with their vendor. Vendors in turn provide extra margins to the reseller for providing early pipeline visibility for these deals and keeping out competitors. Once a deal is registered, other resellers or your direct sales team can't compete for the registered deal.

Configure deal registration to:

- Automate the submission & approval process
- Increase partner competitiveness and participation
- Provide incentives to partners for leads they convert quickly
- Get early visibility into your pipeline
- Manage channel conflict
- Monitor channel revenues both within your community and in Salesforce

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Here's a summary of how to configure deal registration in your Partner Central community.

#### IN THIS SECTION:

##### [Create Processes for Deal Registration](#)

A process allows you to define or customize the stages in the sales process for leads or opportunities.

##### [Create Page Layouts for Deal Registration](#)

Use page layouts to control field visibility and behavior for different types of users and sales processes. There are likely fields on leads that you might not want to expose only to channel managers and not partners.

##### [Create Lead Record Types for Deal Registration](#)

Create a lead record type to track deals submitted by partners in communities. Record types help you differentiate between sales leads and registered deals, assign page layouts for each profile for deal registration, and simplify reporting by lead record type.

##### [Create a Global Action to Let Partners Register Deals](#)

Create a global action to allow partners to register deals from communities. Partner Central comes with a Quick Create button that you can add the global action to so partners can register deals.

##### [Customize Opportunities for Deal Registration](#)

Create an opportunity process, page layout, and record type, similar to leads.

##### [Create Approval Workflows for Deal Registration](#)

Approval workflows are unique to each organization's sales needs and business processes.

##### [Customize Partner Central for Deal Registration](#)

Partner Central comes predesigned to support deal registration. Use the Quick Create button to share a global action to submit registered deals. The template contains lead and deal list views for partner users.

## Create Processes for Deal Registration

A process allows you to define or customize the stages in the sales process for leads or opportunities.

When you select status values for a process, think of all the stages a lead or an opportunity goes through. For example, for deal registration, the Lead Status values could be New, Submitted, Approved, Rejected.

Create a process for leads. Create a separate process for opportunities.



**Tip:** To use more values than the master process record provides, [customize the Lead Status picklist values](#) for leads before you create the lead process. Also, add the Deal Registration to the Lead Source picklist values.

1. From Setup, enter *Processes* in the Quick Find box.
2. To [create a process](#) for leads, select **Lead Processes**. To create a process for opportunities, select **Sales Process** under Opportunities.
3. Select the stages best suited to the lead or opportunity and your business needs.
4. Save the process.

#### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

#### USER PERMISSIONS

To create processes:

- Customize Application

## Create Page Layouts for Deal Registration

Use page layouts to control field visibility and behavior for different types of users and sales processes. There are likely fields on leads that you might not want to expose only to channel managers and not partners.

Create two page layouts: one for the channel manager and partner profiles in your partner community.

1. From Setup, enter *Leads* in the Quick Find box, then select **Page Layouts** under Leads.
2. Create a lead [page layout](#) for partner users by cloning the master lead layout. Let's call this **Deal Registration - <User Profile>**, or specifically, Deal Registration - Partner Users.
3. Modify the page layout to add, remove, or modify the behavior of fields, action buttons, related lists, and layouts based on who the layout is for.



### Tip:

- Extend the Lead Source picklist values to indicate which leads are submitted by partners as deals.
- Add a custom, auto-numbering field called *Deal ID* to both partner and channel manager page layouts. You can use this field value as a separate identifier for deals, in both leads and opportunities.

4. Save the page layout.
5. Repeat for channel manager profiles.

## Create Lead Record Types for Deal Registration

Create a lead record type to track deals submitted by partners in communities. Record types help you differentiate between sales leads and registered deals, assign page layouts for each profile for deal registration, and simplify reporting by lead record type.



**Note:** Creating a lead record type requires you to associate it with a [lead process](#) and allow you to specify [page layouts](#) to be used with different profiles. Similarly, creating an opportunity record type requires you to provide a sales process and opportunity page layouts.

1. From Setup, enter *Record Types* in the Quick Find box, then select **Record Types** under Leads. To create an opportunity record, select **Record Types** under Opportunities.
2. Create a lead record type to track registered deals called **Registered Deal**. If you're creating an opportunity record type, create one for registered deals as well.
3. Activate the record type and assign it to the appropriate partner and channel manager profiles for your community.
4. Assign page layouts for the partner and channel manager profiles.
5. If you haven't already, edit the picklist values for the Lead Source field to include a value for registered deals.

If this is the first time you're setting up a deal registration process for your company, consider converting existing leads to the generic sales lead record type. Using separate record types for standard leads versus registered deals simplifies the reporting process.

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

### USER PERMISSIONS

To create or customize page layouts:

- Customize Application

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

## Create a Global Action to Let Partners Register Deals

Create a global action to allow partners to register deals from communities. Partner Central comes with a Quick Create button that you can add the global action to so partners can register deals.

1. From Setup, enter *Global Actions* in the Quick Find box, then select **Global Actions**.
2. Create a global action, select **Lead** as the target object, and the [record type](#) for the deal registration process.
3. Select or specify an appropriate label for the global action. This label displays in the Create button menu in your community.
4. Fill out the other details and save the global action.
5. Customize the fields in the global action layout, based on the information you want your partners to submit for each deal.



**Tip:** Use a Lead Source value to indicate that the lead has been captured from the Deal Registration process.

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

## Customize Opportunities for Deal Registration

Create an opportunity process, page layout, and record type, similar to leads.

Many companies create separate sales processes for their direct and indirect sales opportunities. Some companies prefer to expose a shorter list of opportunity stage values that are less granular compared to stages used by their direct sales team.

1. [Create an opportunity process](#).
2. [Create two opportunity page layouts](#), one for partner users and one for channel managers.
3. [Create an opportunity record type to track registered deals](#), different from the opportunity record type you use to track direct sales opportunities.



**Tip:**

- Many companies struggle with how to report on channel versus internal sales. Using separate record types to categorize opportunities by who is working on them—internal sales teams or partners—allows you to report on direct and channel sales separately.
  - Make this opportunity record type the default for partner users. This ensures they see the same record type when the opportunity is converted, regardless of who does the conversion.
  - Add the Deal Registration value to the Lead Source picklist values for the opportunity record type.
4. [Map any custom fields](#) on the lead record type to the opportunity record type for deal registration.

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

## Create Approval Workflows for Deal Registration

Approval workflows are unique to each organization's sales needs and business processes.

Approval workflows should account for how you want to route submitted deals, how you want to filter and evaluate them, and what notifications you want to send out. A few guidelines for planning your approval workflows:

- **Email Templates:** Create email templates for each stage of the approval process that you to send notifications for.
- **Routing:** Screen leads by record type and submit all registered deals for approval.
- **On Submission:** Identify what field values change on the lead record on submission, for example the lead status. Decide if the lead record must be locked until it is approved or rejected.
- **Evaluation:** Decide what qualifies a submitted lead to be considered for deal registration. Determine any thresholds, filter criteria, and stages you want to filter by.
- **Approval:** Decide who to route the submitted deal to. Typically, this is the channel manager. Decide what happens on approval.
  - Change the Lead Status to approved.
  - Convert the lead to an opportunity.
  - Send an email notification to the partner user.
  - Set a deal expiration date and save the deal approval date for reporting.
  - Extend any margins or discounts that you might offer to the partner on successful closure.
- **Rejection:** Decide what criteria disqualify a lead. Set the Lead Status to rejected. Send an email notification to inform them of the rejection. Unlock the lead record so partners can modify and resubmit if necessary.

For detailed instructions, see the [approval workflow](#) documentation in the Salesforce Help

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

### USER PERMISSIONS

To create processes:

- Customize Application

## Customize Partner Central for Deal Registration

Partner Central comes predesigned to support deal registration. Use the Quick Create button to share a global action to submit registered deals. The template contains lead and deal list views for partner users.

1. In your Partner Central community, go to the Home page in Community Builder.
2. Click the **Quick Create** component and add another global action. By default, a New Account action is added. Click it and select the [global action](#) you created for partners to register deals.
3. To save your changes, publish the community.
4. Log in as a partner to test the deal registration process.
  - Submit a couple registered deals from the Quick Create button.
  - In a different browser, log in to see if the approval workflows are working. Approve or reject a deal.
  - Back in the community, check the lead and deal list views as partner.

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

## Educate Your Users About Communities

Tell community members what to expect from their community experience.

### IN THIS SECTION:

#### [Switch Between Your Salesforce Org and Your Communities](#)

If you use Lightning communities and Lightning Experience, use the App Launcher to switch back and forth between your Salesforce org and your communities. If you use Tabs + Visualforce communities and Salesforce Classic, use the global header.

#### [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

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

## Switch Between Your Salesforce Org and Your Communities

If you use Lightning communities and Lightning Experience, use the App Launcher to switch back and forth between your Salesforce org and your communities. If you use Tabs + Visualforce communities and Salesforce Classic, use the global header.

Switching between your Salesforce org and your communities doesn't disrupt your workflow. We return you to the page where you were last working, either in the current browser tab (standard apps) or in a new browser tab (connected apps and communities). Also, you can work in multiple communities at once from separate browser tabs.

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

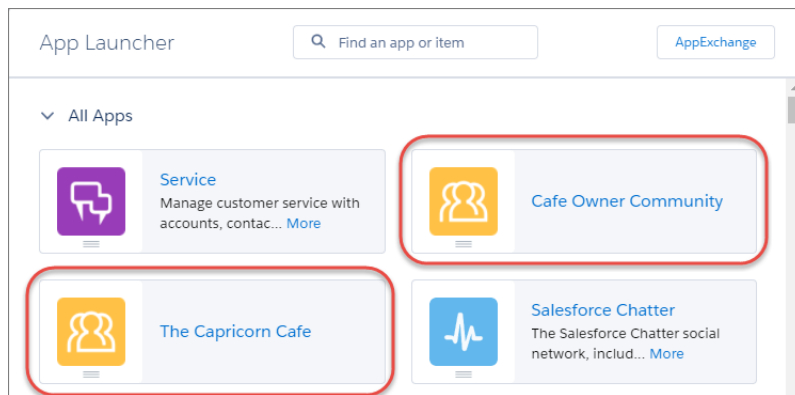
Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions

## App Launcher for Lightning Communities and Lightning Experience

The App Launcher is available in communities based on Customer Service (Napili), Partner Central, and any Lightning Bolt solutions. By default, the App Launcher is hidden in existing communities and displayed in new communities.

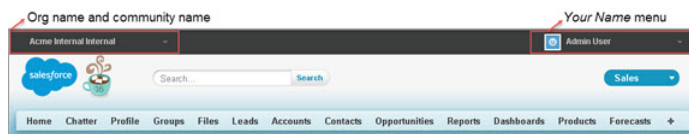


In Lightning Experience, the App Launcher displays a tile for every published community along with your apps. In Lightning communities, the App Launcher displays a tile for every published community and app but the All Items area and AppExchange link aren't available. Members see only the communities and apps that they're authorized to see according to their profile or permission sets.



**Note:** The App Launcher is not available in the Salesforce1 mobile app or in Salesforce Tabs + Visualforce communities. Members of these communities can use the global header to switch between their Salesforce org and their communities.

## Global Header for Tabs + Visualforce Communities and Salesforce Classic



The menu on the left side lets you switch between communities and your Salesforce org.

- 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.

**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.

SEE ALSO:

[Enable the App Launcher in Lightning Communities](#)

[Enable the Global Header for Communities](#)

[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	Default Visibility	Where to Set in User Interface	Options for Restricting Visibility	API Controls on User Object
First Name Last Name Nickname About Me	Public	Go to <i>Your Name</i> > <b>Edit Contact Info</b> , then click <b>About</b>	Everyone see these fields unless your administrator enables nickname display or creates a custom page that displays this information. If your administrator has enabled nickname display, your nickname displays in place of your first and last names in most locations.	N/A
Title	External	Go to <i>Your Name</i> > <b>Edit Contact Info</b> , then click <b>About</b>	Employees, external, or public	UserPreferencesShowTitleToExternalUsers UserPreferencesShowTitleToGuestUsers  <b>Note:</b> When the guest user preference is set to <code>true</code> , the job title field is visible to external members even if the external member preference is set to <code>false</code> .
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 <b>Show in communities with publicly accessible pages</b>	External or public	UserPreferencesShowProfilePicToGuestUsers
City Country Email Fax Mobile Phone State Street Address Work Phone	Employees	Go to <i>Your Name</i> > <b>Edit Contact Info</b> , then click <b>Contact</b>	Employees, external, or public	 <b>Note:</b> For each pair of preferences controlling the visibility of a field, when the guest user preference is set to <code>true</code> , the field is visible to external members even if the external member preference is set to <code>false</code> .  UserPreferencesShowCityToExternalUsers UserPreferencesShowCityToGuestUsers UserPreferencesShowCountryToExternalUsers

Contact Information	Default Visibility	Where to Set in User Interface	Options for Restricting Visibility	API Controls on User Object
Zip/Postal Code				UserPreferencesShowCountryToGuestUsers UserPreferencesShowEmailToExternalUsers UserPreferencesShowEmailToGuestUsers UserPreferencesShowFaxToExternalUsers UserPreferencesShowFaxToGuestUsers UserPreferencesShowManagerToExternalUsers UserPreferencesShowManagerToGuestUsers UserPreferencesShowMobilePhoneToExternalUsers UserPreferencesShowMobilePhoneToGuestUsers UserPreferencesShowPostalCodeToExternalUsers UserPreferencesShowPostalCodeToGuestUsers UserPreferencesShowStateToExternalUsers UserPreferencesShowStateToGuestUsers UserPreferencesShowStreetAddressToExternalUsers UserPreferencesShowStreetAddressToGuestUsers 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:

### EDITIONS

Available in: **Salesforce Classic** and **Lightning Experience**


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

- 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 *j.doe*. If that term isn't contained in any of the searchable fields in the user object, John Doe's record isn't included in search results.

- Search results include all the records and files that a community member has access to. This includes records not explicitly exposed in the community or records and files they have access to in the internal Salesforce organization. In file searches, users can see:
  - Files they own
  - Files shared with them directly
  - Files they have access to in a library
  - Files that are posted to a record they have access to
  - Files that are posted to groups or shared with that community
- The admin must enable search result filters for an object in the internal org for it to be searchable in a community. To make custom objects searchable, the object must be associated to a tab in the internal org.

#### For communities using the Koa and Kokua templates:


- The Featured Search component lets community members search for articles within a specific data category.
  - The Article List component shows the search results based on the search term entered in Featured Search.
-  **Note:** The Koa and Kokua templates are starting a phased retirement. In Summer '17, you can no longer use these templates to create communities. Salesforce still supports existing communities that were built using Koa and Kokua. To create a community based on Koa or Kokua, contact Salesforce Support. However, we recommend that you work with Salesforce Support on a plan to replace your existing Koa and Kokua communities. New Lightning communities provide richer support for Knowledge and case management.

#### 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, feeds (discussions), 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 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.

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

## 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.

	<b>Administrator or Salesforce user with "Create and Set Up Communities" permission</b>	<b>Salesforce Community Member (all Salesforce licenses including Chatter Free and Chatter Only)</b>	<b>External Community Member (Customer Portal, Partner Portal, Partner Community, or Customer Community license)</b>
Administer communities in Salesforce	Can create, customize tabs and branding, add or remove members, and activate or deactivate a community. User must also have the "Customize Application" permission to create or customize communities.	Not available	Not available
Global Header	<p>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.</p> <p>Can access setup for all communities regardless of status.</p> <p>Can see communities in <i>Preview</i> status.</p>	<p>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.</p> <p>Can't access communities in <i>Inactive</i> status.</p> <p>Can see communities in <i>Preview</i> status if a link is provided.</p>	<p>The drop-down in the global header shows a list of communities the user has access to.</p> <p>Can't access communities in <i>Inactive</i> status.</p> <p>Can see communities in <i>Preview</i> status if a link is provided.</p>
<i>Your Name</i> menu in Global Header	Same as in internal organization.	<p>Same as in internal organization.</p> <p>Chatter Free users see a My Settings menu, an Edit Contact Info menu, and a Logout link. For Chatter Free</p>	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

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

	<b>Administrator or Salesforce user with “Create and Set Up Communities” permission</b>	<b>Salesforce Community Member (all Salesforce licenses including Chatter Free and Chatter Only)</b>	<b>External Community Member (Customer Portal, Partner Portal, Partner Community, or Customer Community license)</b>
		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 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 doesn’t appear for communities created using the Salesforce Tabs + Visualforce template. This menu only appears within Community Management.	Users with “Manage Communities” can see the menu and use it to preview the community or access Community Builder, Site.com Studio, and Force.com. Note that the Community Builder option doesn’t appear for communities created using the Salesforce Tabs + Visualforce template. This menu only appears within Community Management.	Not available
Salesforce Online Help	Can see Salesforce Online Help.	Standard Salesforce user sees Salesforce Online Help. Chatter Free user sees Chatter help.	Not available
People	Can see everyone else in the community and vice versa.		
Profiles and people hovers	Can see all contact information fields (such as Title, Work Phone, and Email) on all community members’ profiles. In people hovers, user always sees members’ Title, Work Phone, and Mobile Phone fields.		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

	<b>Administrator or Salesforce user with “Create and Set Up Communities” permission</b>	<b>Salesforce Community Member (all Salesforce licenses including Chatter Free and Chatter Only)</b>	<b>External Community Member (Customer Portal, Partner Portal, Partner Community, or Customer Community license)</b>
			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 <a href="#">Set Up Report Management for External Users—Create and Edit Reports</a> . All role-based external users can refresh dashboards.
Salesforce Knowledge Articles	Salesforce Knowledge User License, Read permission on the article type, and visibility on the category.	Salesforce Knowledge User License, Read permission on the article type, and visibility on the article's category.	Visibility on the article's category.

## Chatter Visibility

	<b>Salesforce Administrator</b>	<b>Salesforce Community Member (all Salesforce licenses including Chatter Free and Chatter Only)</b>	<b>External Community Member (Customer Portal, Partner Portal, Partner Community, or Customer Community license)</b>
Groups	<p>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.</p> <p>Can create new groups. In groups user is a member of, can post, comment, post files or</p>	<p>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.</p> <p>Can create new groups. In groups user is a member of, can post, comment, post files or</p>	<p>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.</p> <p>Can create new groups. In groups user is a member of, can post, comment, post files or</p>

	<b>Salesforce Administrator</b>	<b>Salesforce Community Member (all Salesforce licenses including Chatter Free and Chatter Only)</b>	<b>External Community Member (Customer Portal, Partner Portal, Partner Community, or Customer Community license)</b>
	<p>links, or share someone else's post.</p> <p>Administrators can also control whether users in the organization and external users can create new groups through the "Create and Own New Chatter Groups" user permission.</p>	links, or share someone else's post.	links, or share someone else's post.
Files	<p>Regardless of the current community, users see files they own, that are shared with them directly, that they have access to in a library, or that are posted to a record they have access to.</p> <p>Files posted to groups and shared with an entire community can only be viewed in that community.</p>		<p>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".</p>
Profiles	Can see profiles for all members in the current community.		<p>Can see profiles for all members in the current community.</p> <p>Cannot see profiles of users in the internal organization.</p> <p>Profile visibility enforces user sharing.</p>
Recommendations	User gets people, group, file, and record recommendations for the current community only.		
Activity and Influence	<p>Can see activity statistics and influence for the current community.</p> <p>All activity on records, such as posts and comments, is counted in the user's internal organization and not in the community where the activity occurred.</p>		<p>Can see activity statistics and influence for the current community.</p> <p>All activity on records, such as posts and comments, is not counted in the user's activity statistics and influence.</p>
Email Notifications	<p>Email notification preferences are set by community. Within a community, users can control their Chatter email notifications in their personal settings.</p> <p>Can control email notifications for their internal organization</p>	Email notification preferences are set by community. Within a community, standard Salesforce user can control their Chatter	<p>Email notification preferences are set by community. Within a community, external users can control their Chatter email notifications under <i>Your Name</i> &gt; <b>My Settings</b> &gt; <b>Email Settings</b>. Portal users can also control group email notifications on each group's page.</p>

	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)
	<p>from their personal settings. (Enter <i>Chatter</i> in the <i>Quick Find</i> box, then select <b>Email Notifications</b>.)</p> <p>Within a community, all users can control group email notifications on each group's page.</p> <p>Chatter personal email digests are not supported in Communities. Group digests are supported, but the option to receive email notifications for every post is disabled when groups exceed 10,000 members. All members who had this option selected are automatically switched to daily digests.</p>	<p>email notifications in their personal settings.</p> <p>Can control email notifications for their internal organization from their personal settings. (Enter <i>Chatter</i> in the <i>Quick Find</i> box, then select <b>Email Notifications</b>.)</p> <p>Chatter Free user can control Chatter emails for their communities under <i>Your Name</i> &gt; <b>My Settings</b> &gt; <b>Email Settings</b>. The chosen settings apply to the current community.</p> <p>Within a community, all users can control group email notifications on each group's page.</p> <p>Chatter personal email digests are not supported in Communities. Group digests are supported, but the option to receive email notifications for every post is disabled when groups exceed 10,000 members. All members who had this option selected are automatically switched to daily digests.</p>	<p>Chatter personal email digests are not supported in Communities. Group digests are supported, but the option to receive email notifications for every post is disabled when groups exceed 10,000 members. All members who had this option selected are automatically switched to daily digests.</p>
Topics	Can see hashtag topics and Chatter topics, including topics in feeds, the topics list, topic detail pages, Trending Topics, and Recently Talked About topics for the current community only.		
Favorites	Can add search, topic, and list view favorites in the current community.		Can add only topic favorites in the current community.
Chatter Messages	In their list of Chatter messages, can see private messages they have sent or received in their	In their list of Chatter messages, can see private messages they have sent or received in their internal organization and any communities they're a member of.	<p>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.</p> <p>Can send a Chatter message to a member of a common</p>

	<b>Salesforce Administrator</b>	<b>Salesforce Community Member (all Salesforce licenses including Chatter Free and Chatter Only)</b>	<b>External Community Member (Customer Portal, Partner Portal, Partner Community, or Customer Community license)</b>
	<p>internal organization and any communities they're a member of.</p> <p>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.</p> <p>Administrators with "Manage Chatter Messages" and "API Enabled" permissions can delete messages.</p> <p>The API allows users to send Chatter messages across communities.</p>	<p>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.</p>	<p>community, but must initiate the message within the community that the target user is a member of.</p> <p>Chatter messages are accessed through the Chatter tab, which may be disabled for external community members. Administrators should ensure that the Chatter tab is enabled if using Chatter messages in communities.</p>
Messenger (Chat)	Messenger is not available with Communities.		

## Feeds Visibility


The following table shows what each kind of user can do or see in Chatter Feeds within a community.

	Salesforce Administrator	Salesforce Community Member	External Community Member (Customer Portal, Partner Portal, Partner Community, or Customer Community license)
Post on a record	Can post on any records within the community.	Can post on any records within the community to which the user has access.	Can post on any records within the community to which the user has access.
Bookmark a post	Can bookmark posts within the current community. The Bookmarked feed only contains posts from the current community.		
Mention someone	Can mention people specific to the current community. User can't mention an external user on an internal post.	Can mention people specific to the current community.	
Share a post (repost)	Can share a post only in the current community.		
Add topics to a post	Can add hashtag topics and Chatter topics to any posts within the current community. Topics are specific to the current community and can't be accessed from another community.		

## Search Visibility

[Search behavior in communities](#) varies slightly from the search in the internal organization. Search results respect sharing rules for all items by default. The following table describes what each type of user in a community can see in search results.

Search Results For	Administrator	Salesforce Community Member	External Community Member (Customer Portal, Partner Portal, Partner Community, or Customer Community license)
People	People specific to the current community.		
Users	<ul style="list-style-type: none"> <li>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.</li> <li>Portal users can't search for users in the community when sidebar search is enabled.</li> <li>When external community members search for users, global search and enhanced user lookups (with the <b>All Fields</b> option selected) query the following limited set of fields on user records: <ul style="list-style-type: none"> <li>Name</li> <li>Username</li> <li>User ID</li> <li>Body</li> <li>Email</li> <li>Phone</li> <li>Custom fields</li> </ul> </li> </ul>		
Groups	Groups specific to the current community.		
Files	<div> <div> <p>Visibility in the current community:</p> <ul style="list-style-type: none"> <li>Owned files</li> <li>Files shared with the user in a public or private group</li> <li>Files shared with the entire community</li> </ul> </div> <div> <p>Visibility in any community:</p> <ul style="list-style-type: none"> <li>Files posted on accessible records and record feeds</li> <li>Salesforce CRM Content library files that the user has access to</li> </ul> </div> <p>Files owned by a user are always visible in search results for that user, regardless of how they were uploaded.</p> </div> <div> <p>Visibility in the current community:</p> <ul style="list-style-type: none"> <li>Owned files</li> <li>Files shared with the user in a public or private group</li> <li>Files shared with the entire community</li> </ul> <p>Visibility in any community:</p> <ul style="list-style-type: none"> <li>Files posted on accessible records and record feeds (unless the file posted on the record is marked "Internal Only")</li> <li>Salesforce CRM Content library files that the user has access to</li> </ul> </div>		

Search Results For	Administrator	Salesforce Community Member	External Community Member (Customer Portal, Partner Portal, Partner Community, or Customer Community license)
			Files owned by a user are always visible in search results for that user, regardless of how they were uploaded.
Topics	Topics specific to the current community.		
Feeds	Feed posts and comments from within the community where the search is performed.  Global search returns information from all feed contexts. Contextual feed search (  ) returns information from within the context where the search is performed, such as from the feed on a user's profile, a record, or a group. To find information in a different community feed, users must search from within that community.		
Search Auto-Complete	Recently accessed items specific to the current community.		
Records (accounts, contacts, leads, and so on)	Full visibility for all items across all communities and in the internal organization.	Visibility for all items the user has access to through their user profile or permission sets across all communities and in the internal organization.	Visibility for all items the user has access to through their user profile or permission sets across all communities.
User lookups on records	All users across all communities and in the internal organization.		Users who are members of all communities that the user is also a member of, and other external users associated with the same external account. Users with partner portal licenses also see the owner of the portal account.  The Recently Viewed Users list in the lookup shows all users that they have access to via 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 <a href="#">limited</a>

Search Results For	Administrator	Salesforce Community Member	External Community Member (Customer Portal, Partner Portal, Partner Community, or Customer Community license)
			<a href="#">set of fields</a> 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
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](#)

## Communities Resources

In addition to online help, Salesforce creates guides and tip sheets to help you learn about our features and successfully administer Salesforce.

	For End Users	For Admins
<b>Guides and Tip Sheets</b>		
<a href="#">Set Up and Manage Communities</a>		✓
<a href="#">Community Templates for Self-Service Implementation Guide</a>		✓

	For End Users	For Admins
<a href="#">Communities Managers Guide</a>		✓
<a href="#">Migrating From Portals to Communities</a>		✓

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