
Getting Started with the Aloha Community Template for Salesforce Identity

Salesforce, Spring '18



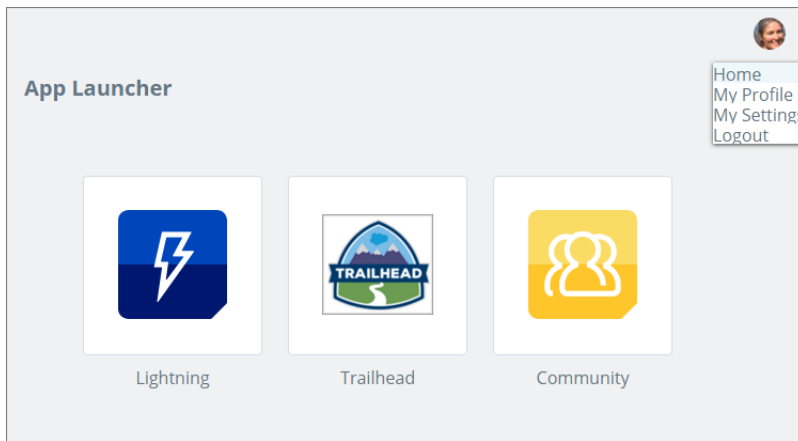
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ALOHA IDENTITY TEMPLATE

Give community members Salesforce Identity features, including their own App Launcher. Community members can access useful applications from other service providers and edit their profile.

Your customers can have easy access to the apps that they need on one page. In a community that's built on the Aloha template, customers launch apps for support, billing, collaboration, or other services with a single click. They can also edit their own user profile information. As an administrator of the community, you can manage their access to third-party apps and monitor and control their usage.



Whether you use Community Builder or Site.com, the template supplies all the components to create a community. Simply edit a few components to include information about your community, add a few images to extend your branding, and you're ready to go—without any coding!

For more information about creating a site with Community Builder and editing elements with Site.com, see [Using Templates to Build Communities](#).

For more information about Salesforce Identity and setting up the App Launcher, see the [Salesforce Identity Implementation Guide](#).

EDITIONS

Available in: Salesforce Classic

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

SET UP THE APP LAUNCHER

Before you expose the App Launcher to your community users, make sure that you've added connected apps to the community's parent org.

The App Launcher is a container that presents users with links to third-party applications and Salesforce apps. To have the applications appear in the App Launcher for your community, you configure them as connected apps in the parent org.

1. Add connected apps to the community's parent org.

The minimum requirement for a connected app is a `START URL` to link the user to the app. Users see only the connected apps they have access to in the App Launcher. You can configure specific authorization settings and behavior. For more information, see [Creating a Connected App](#) in the Salesforce online help.

2. Enable the App Launcher for the profile that's associated with your community members. Or enable the App Launcher with a permission set, and then assign the permission set to each community member.

Now when you use the Aloha template or add the App Launcher element in Site.com to your community, the installed connected apps appear. For more information about configuring the App Launcher, see [App Launcher Overview](#) in the Salesforce online help.

CREATE YOUR COMMUNITY USING THE PRECONFIGURED ALOHA TEMPLATE

To quickly start your site, choose Aloha, one of the Community Builder templates.

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

Customer Account Portal

A private and secure place for customers to access and update their account information. Improve customer relationships and decrease service costs by allowing customers to see and pay invoices, update their account information, and search your knowledgebase for answers to their most frequent questions.

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.

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.

Build Your Own

Provides the basic pages every community needs: Home, Create Record, Error, Record Detail, Record List, Related Record List, Search, Check Password, Forgot Password, Login, Login Error, and Register. Add more pages and components as needed for the experience you're building. Customize your branding and themes to refine the look of your 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 the Salesforce app. 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.

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

To enable Communities:

- Customize Application

To create, update, or delete connected apps:

- Customize Application

AND either

Modify All Data

OR

Manage Connected Apps

To see the App Launcher:

- Use Identity Features enabled on a profile or permission set

AND either

App Launcher set to **Visible** for the profile

OR

App Launcher enabled in the Assigned Apps for the permission set

Create Your Community Using the Preconfigured Aloha Template

Aloha

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

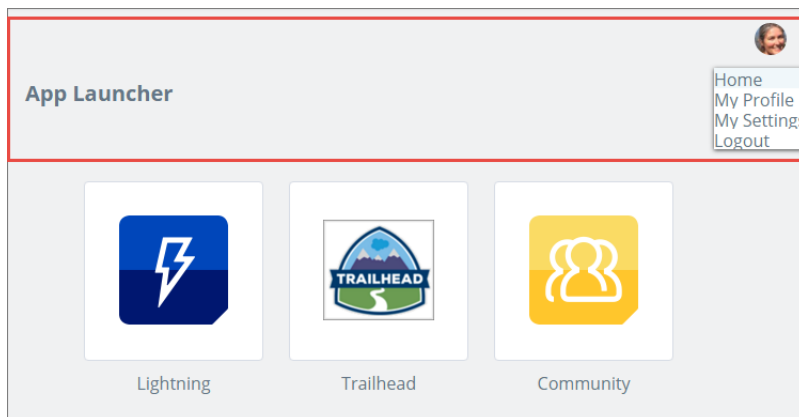
3. Select the Aloha template, then click **Get Started**.
4. Enter the name and optional URL for your community.
Selecting this option updates your community's settings with the URL for the custom pages you create in this step. You can override this login page with another login page in your community's settings. For instructions on creating custom login, logout, and self-registration pages for your community, see the Salesforce Help.
5. Click **Create**.
The community is created in preview status. Now you're ready to build and customize, or manage and moderate your community.

ALOHA TEMPLATE PAGES

The Aloha template gives community members access to the App Launcher, which links to third-party and Salesforce connected apps that they can use. The Aloha template also includes a change password page and a profile page where community members can manage their own information.

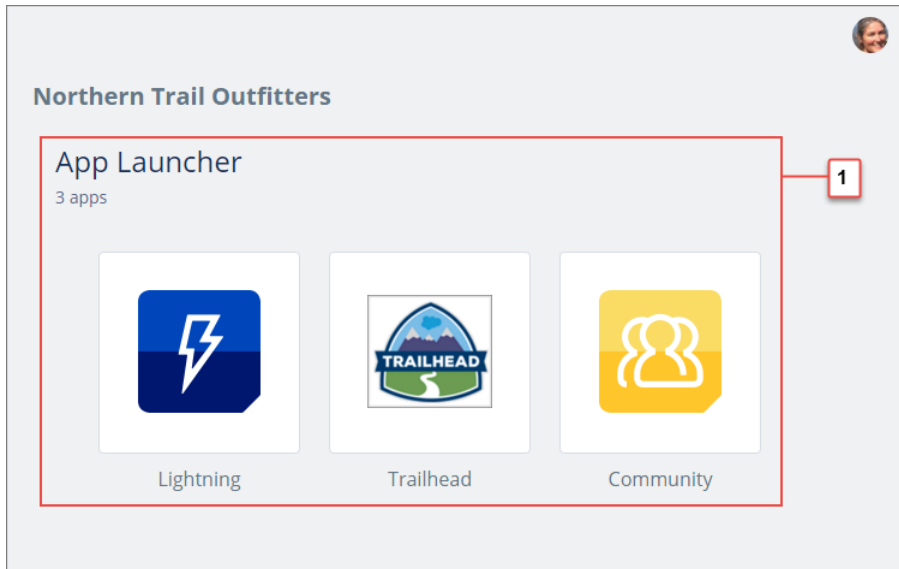
This section highlights each page of the Aloha template and includes a summary of the components that are contained in each page. Other available components are described in [Using Templates to Build Communities](#).

Shared Page Components



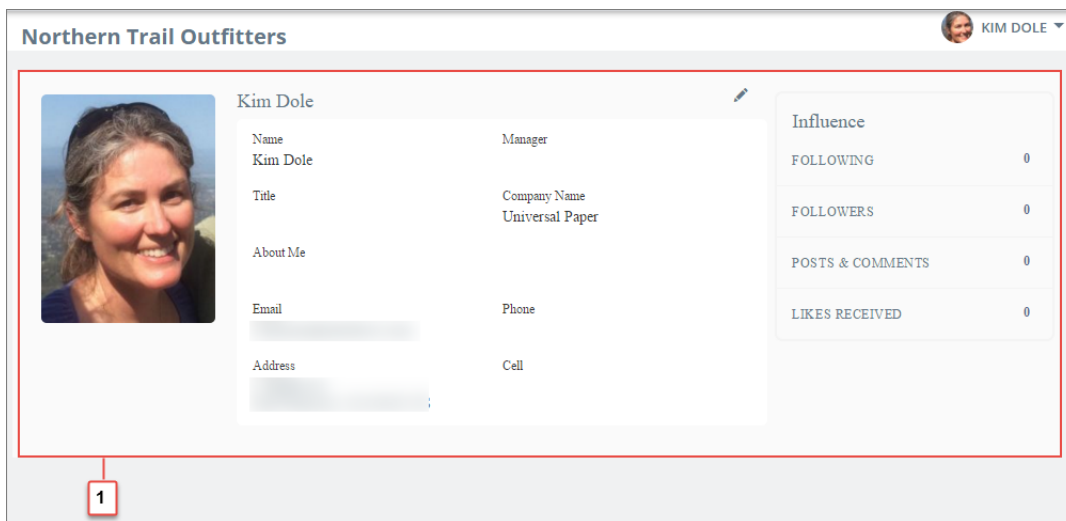
All pages in the Aloha template include the [Identity Header](#). The Identity Header displays header text and the user profile picture with a drop-down that lets users navigate to their profile and settings and log out.

Home



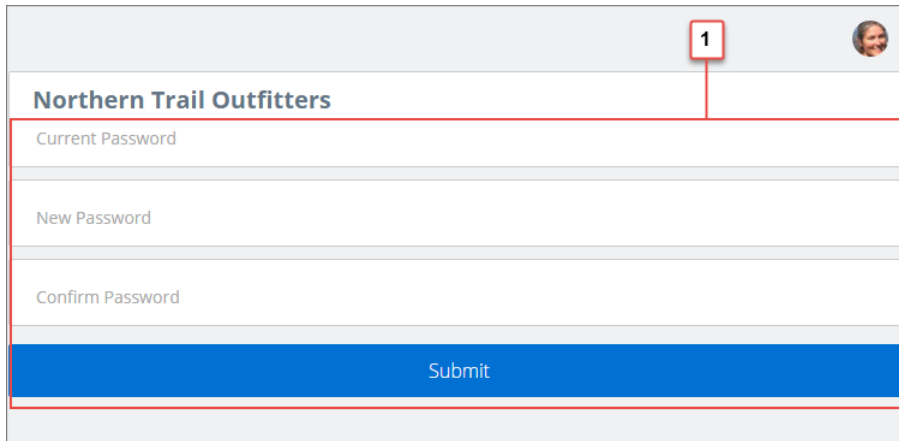
This page contains the [App Launcher](#) component (1), which displays an icon for each connected app that the user can access.

Profile



This page contains the [User Profile Detail](#) component (1), which provides information about the current user based on the user's detail page in the org.

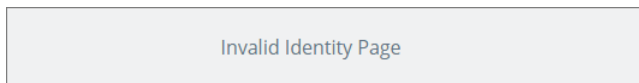
Change Password



The screenshot shows a user interface for changing a password. At the top, there is a header area with the company name "Northern Trail Outfitters" and a user profile picture. A red box labeled "1" highlights this header area. Below the header, there are three input fields: "Current Password", "New Password", and "Confirm Password". At the bottom of the form is a blue "Submit" button.

This page contains the [Change Password Form](#) component (1), which lets users manage their own passwords.

Identity Error



This page displays an error message that you configure by changing the text in a [Rich Content Editor](#) component.

Settings

MY SETTINGS

ACCOUNT

Username

Email Address *

[Change Password](#)

LOCATION

Language

Locale

Time Zone

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

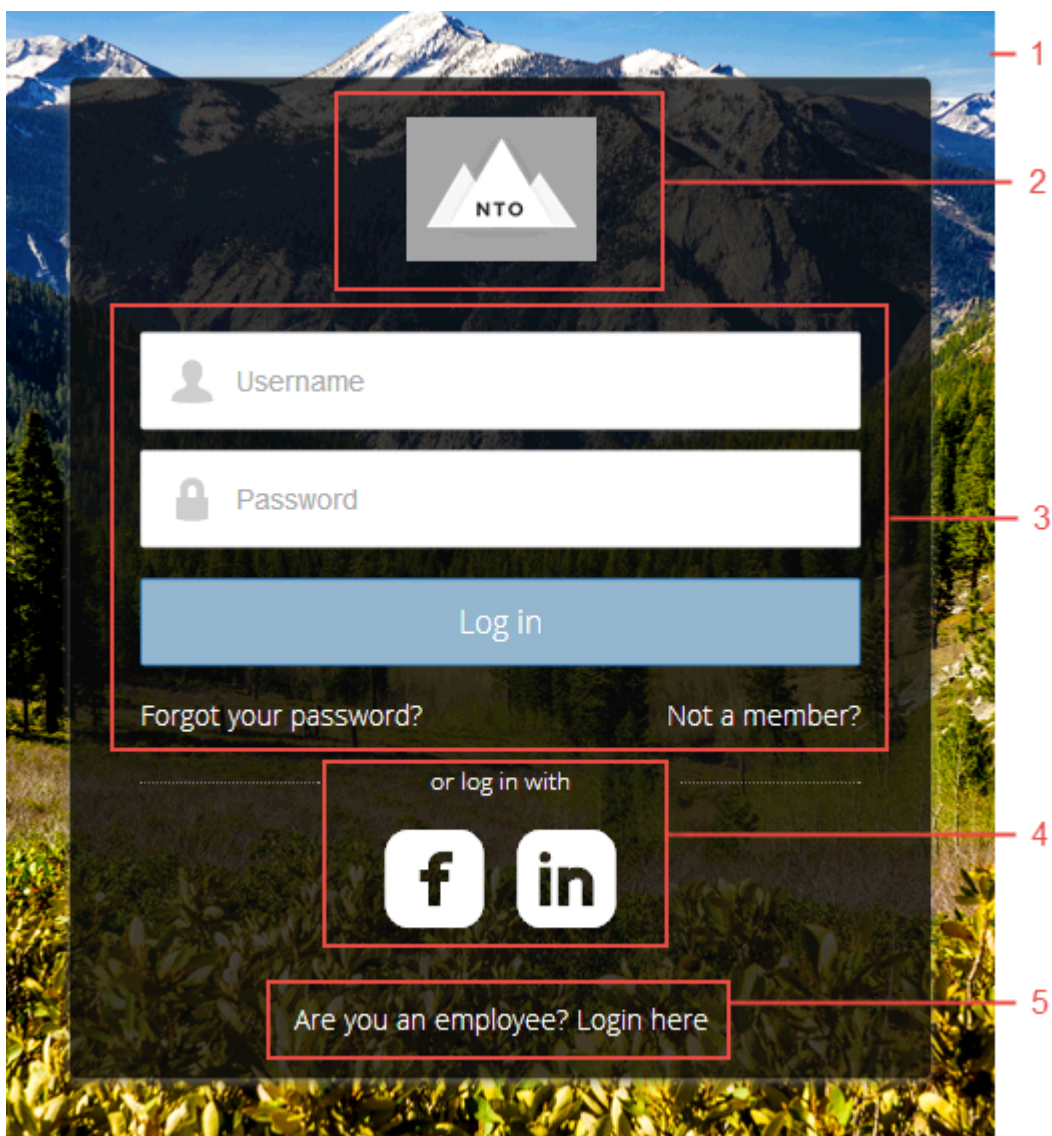
This page contains the [User Settings](#) component, which requires no setup. Users can choose their language, location, and time zone. Also, they can determine if guest users who aren't logged in to the community can view their profile details and choose which activities they want to receive email about.

LOGIN TEMPLATE PAGES

The Login template provides a customized user login experience that can include your company's branding. This template gives users advanced login options to change their password, complete a self-registration form as a new user, or log in with a third-party account. Users who use single sign-on to log in to your community do not see this login page.

This section highlights each page of the Login template and includes a summary of the components that are contained in each page.

Login

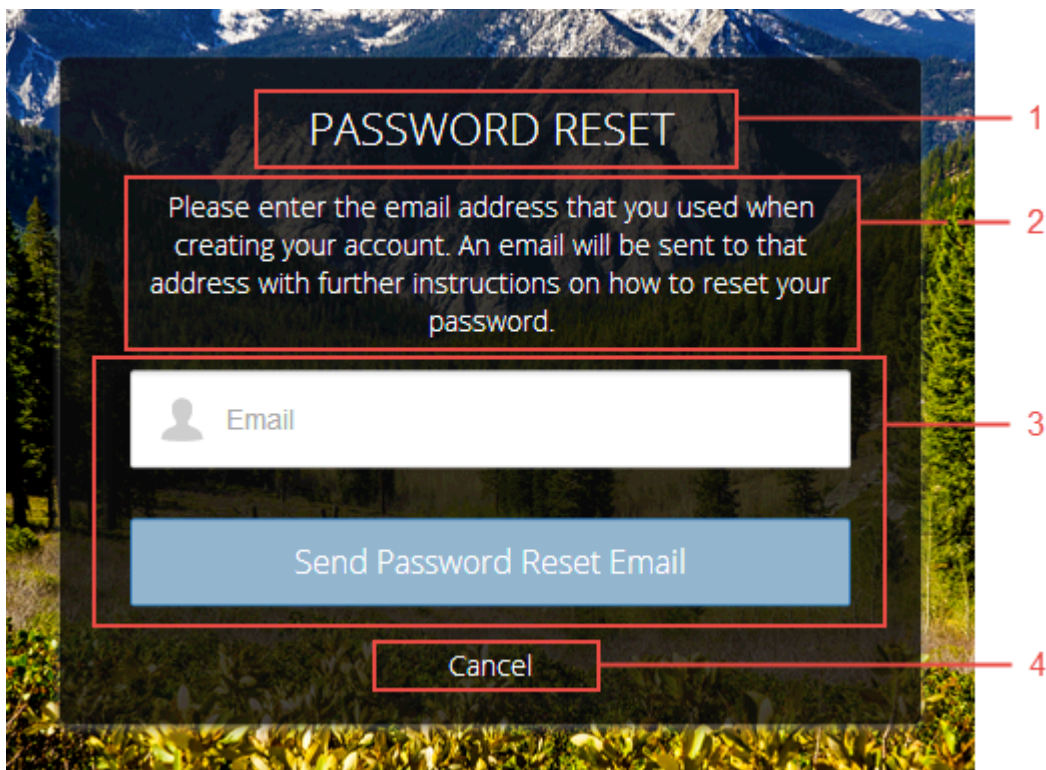


This page contains the following components.

- [Background](#) (1) gives your community's login pages a unique appearance.

- Community Logo (2) identifies your community brand. Set the logo in the Administration Settings for the community. For more information, see “Customizing Communities Login” in the Salesforce Help.
- Login Form (3) allows users to provide their username and password. The Login form includes links to the Forgot Password and Self-Register pages so that users who are having trouble logging in or who don't have current accounts have a self-service option. 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.
- Social Login (4) gives users the ability to log in by using their accounts from identity providers such as Facebook® or LinkedIn®.
- Employee Login (5) provides a link to log in for users with accounts in the parent organization.

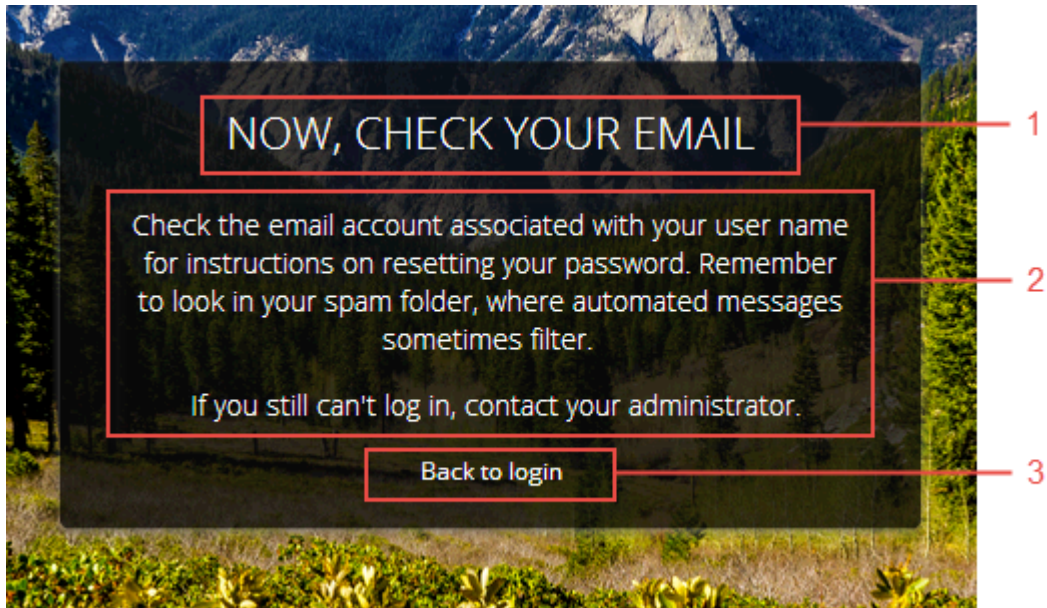
Forgot Password



This page contains the following components.

- Rich Content Editor (1) identifies the page.
- Rich Content Editor (2) provides instructions for users.
- Forgot Password Form (3) provides a field to collect a username and a button to submit the request to reset the password.
- Rich Content Editor (4) gives users a Cancel link for returning to the Login page.

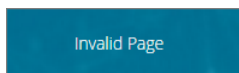
Check Password



This page contains the following components.

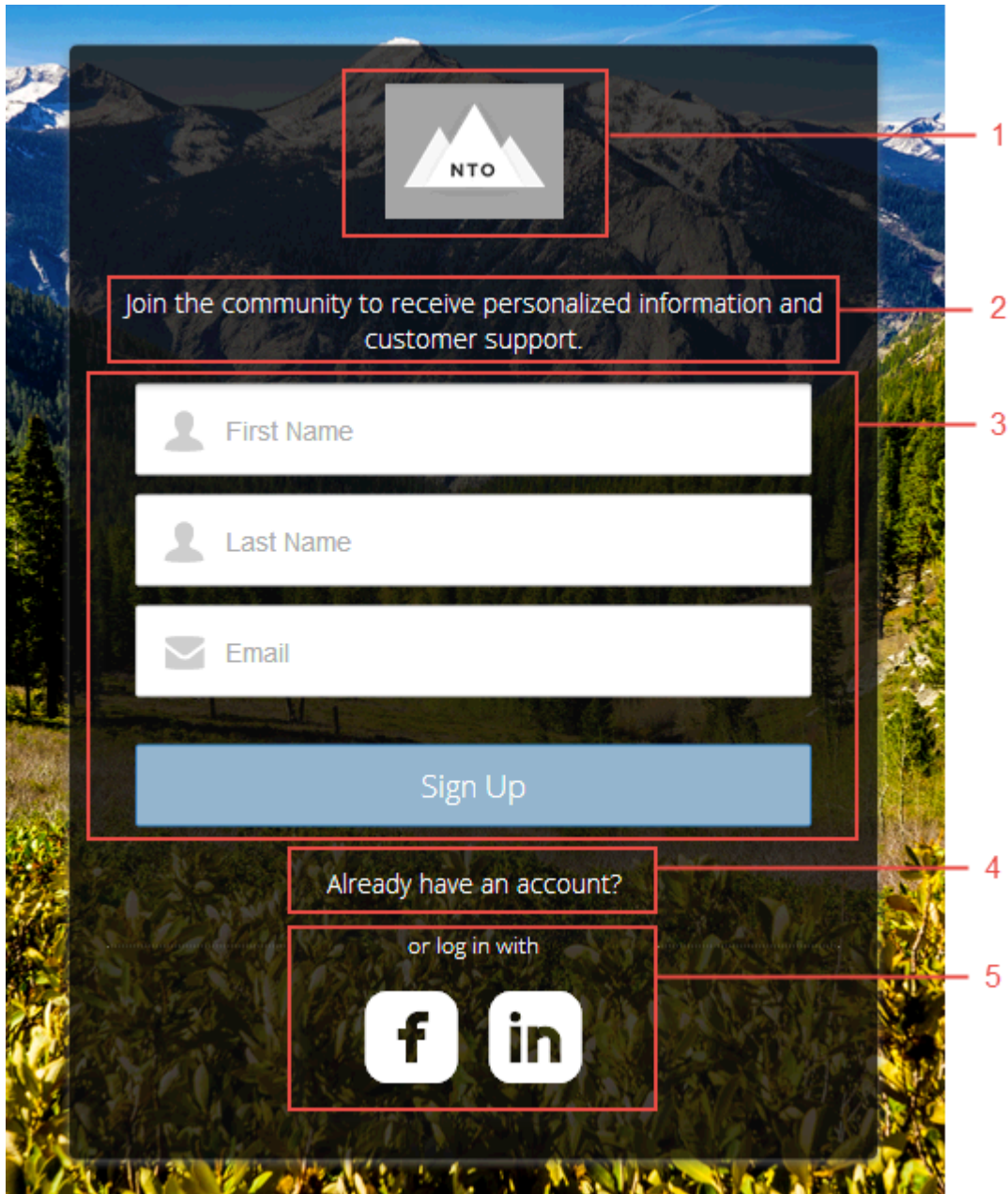
- [Rich Content Editor](#) (1) identifies the page.
- [Rich Content Editor](#) (2) provides instructions for users.
- [Rich Content Editor](#) (3) gives users a link to return to the Login page.

Login Error



This page displays an error message that you configure by changing the text in a [Rich Content Editor](#) component.

Register



This page contains the following components.

- [Community Logo](#) (1) to identify your community brand. The logo is set in the Administration Settings for the community. For more information, see “Customizing Communities Login” in the Salesforce Help.
- [Rich Content Editor](#) (2) provides instructions for users.
- [Self-Registration Form](#) (3) provides fields for users to enter their own information. The fields can be customized to collect various information.
- [Rich Content Editor](#) (4) gives users a chance to return to the login page to log in with an existing account.

Login Template Pages

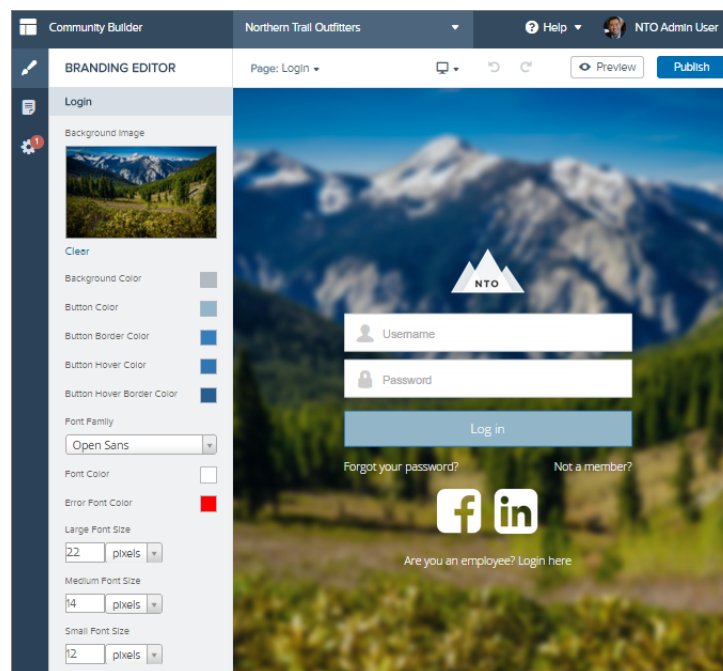
- [Social Login](#) (5) gives users the option to log in using their accounts from third-party identity providers, such as Facebook[®] or LinkedIn[®].

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:



ALOHA AND LOGIN TEMPLATE COMPONENTS

The Aloha and Login templates are each composed of pages, which in turn are made up of customizable components.



Tip: The Page Editor tab in Community Builder lists all components that can be added to the page that you're editing.

Communities that use the Salesforce Tabs + Visualforce template don't use Lightning components.

[App Launcher](#)

The App Launcher gives a user quick access to third-party and Salesforce apps all on one page.

[Change Password](#)

Let users set a new password with a simple form. The Change Password component gives users the ability to update a password without contacting an administrator. You can customize the field and button text in the property editor.

[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.

[Forgot Password](#)

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

[Identity Header](#)

Use the Identity Header to give your pages a title, identify the user, and provide navigation to the user's profile information. The Identity Header component adds the current user's name, gives the user a navigation menu to see the Profile and Settings pages or to log out, and lets you customize the title for your community.

[Login Form](#)

Let users log in with login fields for a username and password and a button for submitting both.

[Rich Content Editor](#)

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

[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.

[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.

[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.

[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.

App Launcher

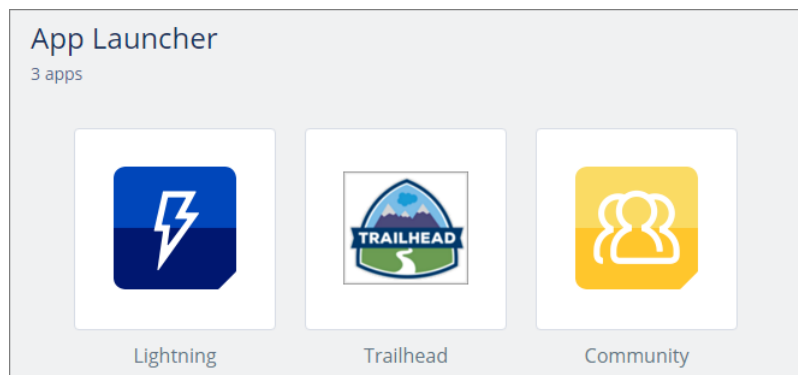
The App Launcher gives a user quick access to third-party and Salesforce apps all on one page.

The **App Launcher** component displays an icon for each connected app, as configured in [Set Up the App Launcher](#). Connected apps can provide single sign-on access to third-party services and Salesforce apps or link users to useful destinations on the web.

1. Select the **App Launcher** component in the page that you're configuring. If you're customizing a page by adding this component, drag the component onto the page from the Lightning Components tab of the Page Editor.
2. In the property editor, configure properties for the component.

Property	Details
Max Number of Apps	Enter the maximum number of apps to display in the App Launcher.
Max App Launcher Height (Pixels)	Enter the maximum height in pixels of the App Launcher component.
Show Header	Select this option to show the App Launcher header.
Display as List View	Select this option to display the apps in a list view instead of tiles.

 **Example:** Sample App Launcher component:



Change Password

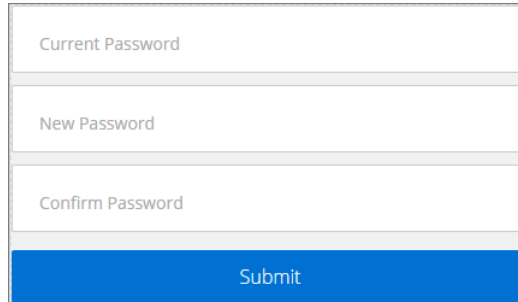
Let users set a new password with a simple form. The Change Password component gives users the ability to update a password without contacting an administrator. You can customize the field and button text in the property editor.

1. Select the **Change Password** component for the page you're configuring. If you're customizing a page by adding this component, drag the component onto the page from the Lightning Components tab of the Page Editor.
2. In the property editor, configure properties for the component:

Property	Details
Current Password Label	Enter the text for the current password field label.

Property	Details
New Password Label	Enter the text for the new password field label.
Confirm Password Label	Enter the text for the confirm password field label.
Submit Button Label	Enter the text for the button that the user clicks to submit the change password request.

 **Example:** Sample Change Password component:



The image shows a sample change password form. It consists of three stacked text input fields with labels: 'Current Password', 'New Password', and 'Confirm Password'. Below these fields is a blue 'Submit' button.

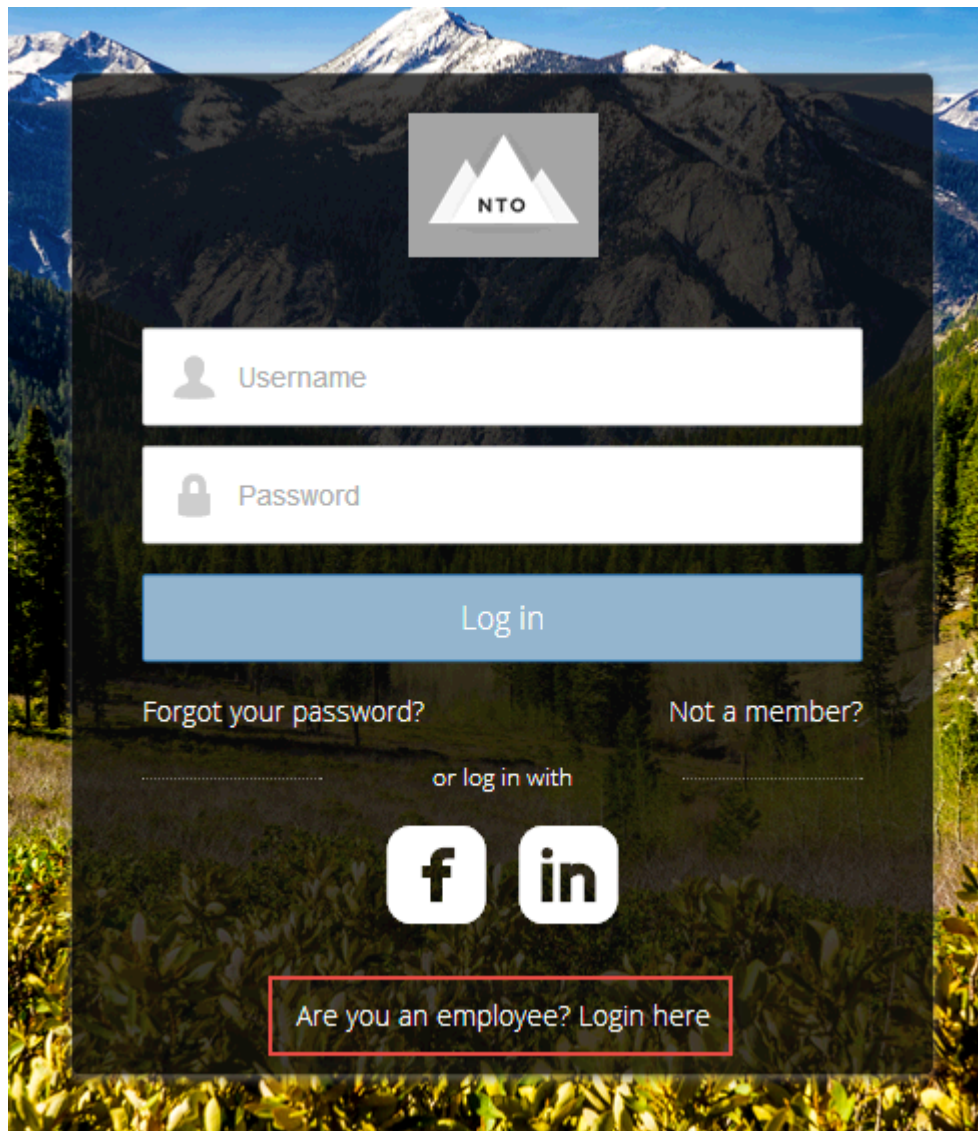
Employee Login Link

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:



Forgot Password

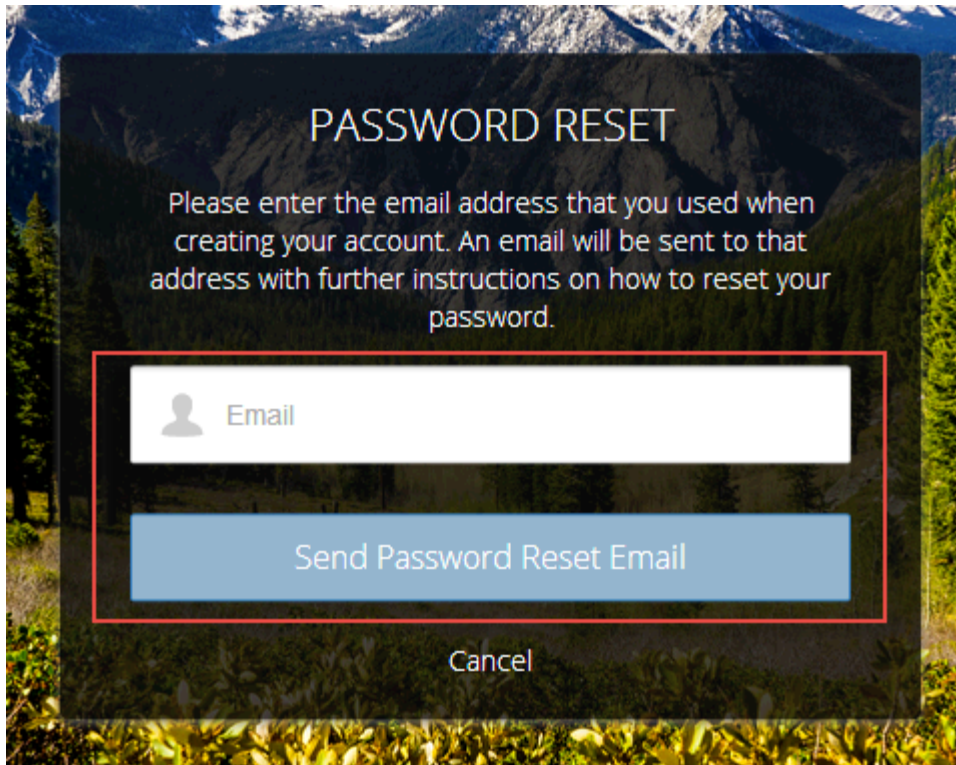
Use the Forgot Password component to let users request a new password.

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:




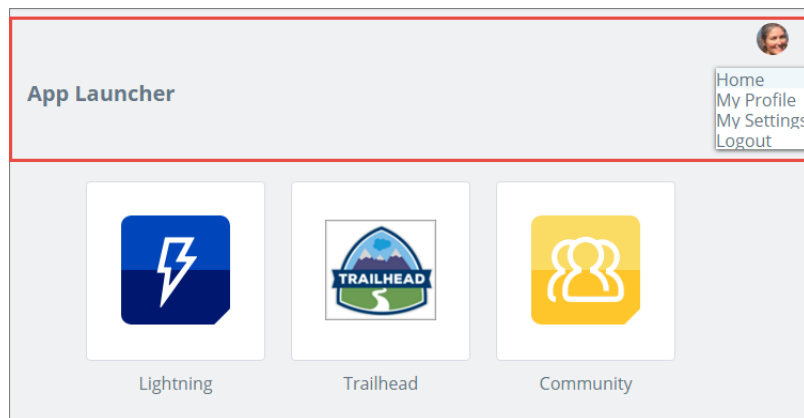
Identity Header

Use the Identity Header to give your pages a title, identify the user, and provide navigation to the user's profile information. The Identity Header component adds the current user's name, gives the user a navigation menu to see the Profile and Settings pages or to log out, and lets you customize the title for your community.

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

Property	Details
Home Label	Enter the text you want to show for the link to the community home page from the user navigation menu. The default is <i>Home</i> .
Login Label	Enter the text you want to show for the link to log in to the community. The default is <i>Login</i> .
Logout Label	Enter the text you want to show for the link to log out from the community. The default is <i>Log Out</i> .
Profile Label	Enter the text you want to show for the link to the user profile page. The default is <i>My Profile</i> .
My Settings Label	Enter the text you want to show for the link to the user's settings page. The default is <i>My Settings</i> .
Header Text	Enter the text you want to show for the title of your page. The default is <i>App Launcher</i> .


 **Example:** Sample Identity Header component showing the navigation menu:



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.

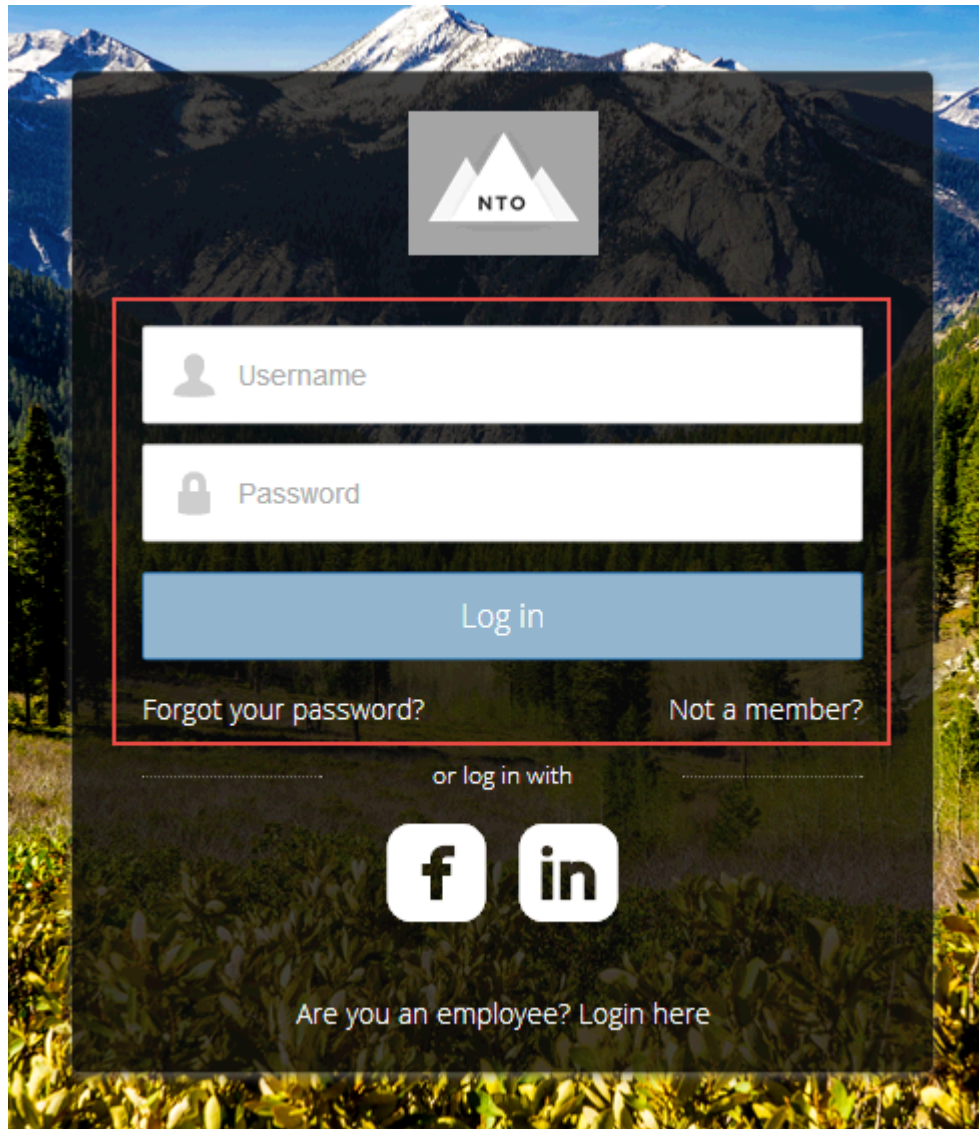
 **Note:** If the community administrator deselects the username and password checkbox on the **Administration > Login & Registration** page in Community Management, the Login Form doesn't appear in the published community. For more information, see "Customizing Communities Login" in the Salesforce Help.

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.

Property	Details
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:

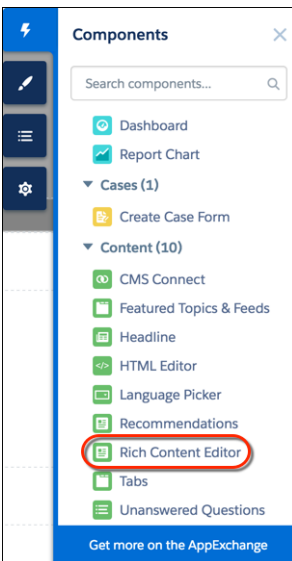


Rich Content Editor

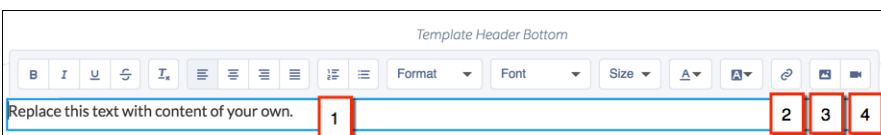
The Rich Content Editor component lets you add formatted custom text to your community pages, along with images and videos.

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.



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.

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 AND View Setup and Configuration

 **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



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.

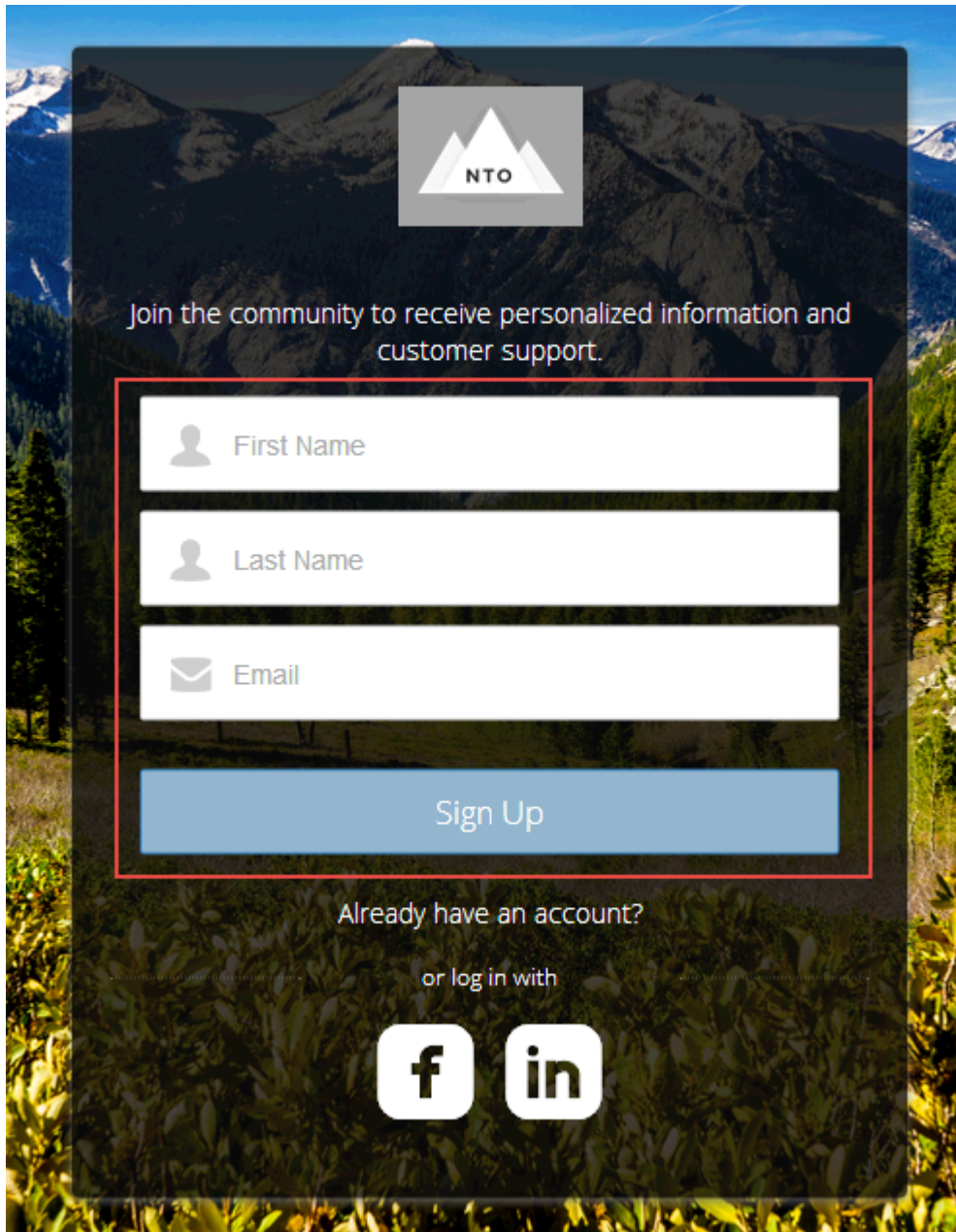
For this component to appear, go to Community Management and select **Administration > Login & Registration > Allow external users to self-register**.

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.

Property	Details
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:



The image shows a self-registration form for a community. At the top, there is a logo consisting of three white triangles forming a mountain shape with the letters 'NTO' below them. Below the logo, the text reads: "Join the community to receive personalized information and customer support." The registration fields are enclosed in a red rectangular border and include: a "First Name" field with a person icon, a "Last Name" field with a person icon, and an "Email" field with an envelope icon. Below these fields is a blue "Sign Up" button. Underneath the button, the text says "Already have an account?" followed by "or log in with" and two social media icons: Facebook and LinkedIn.

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

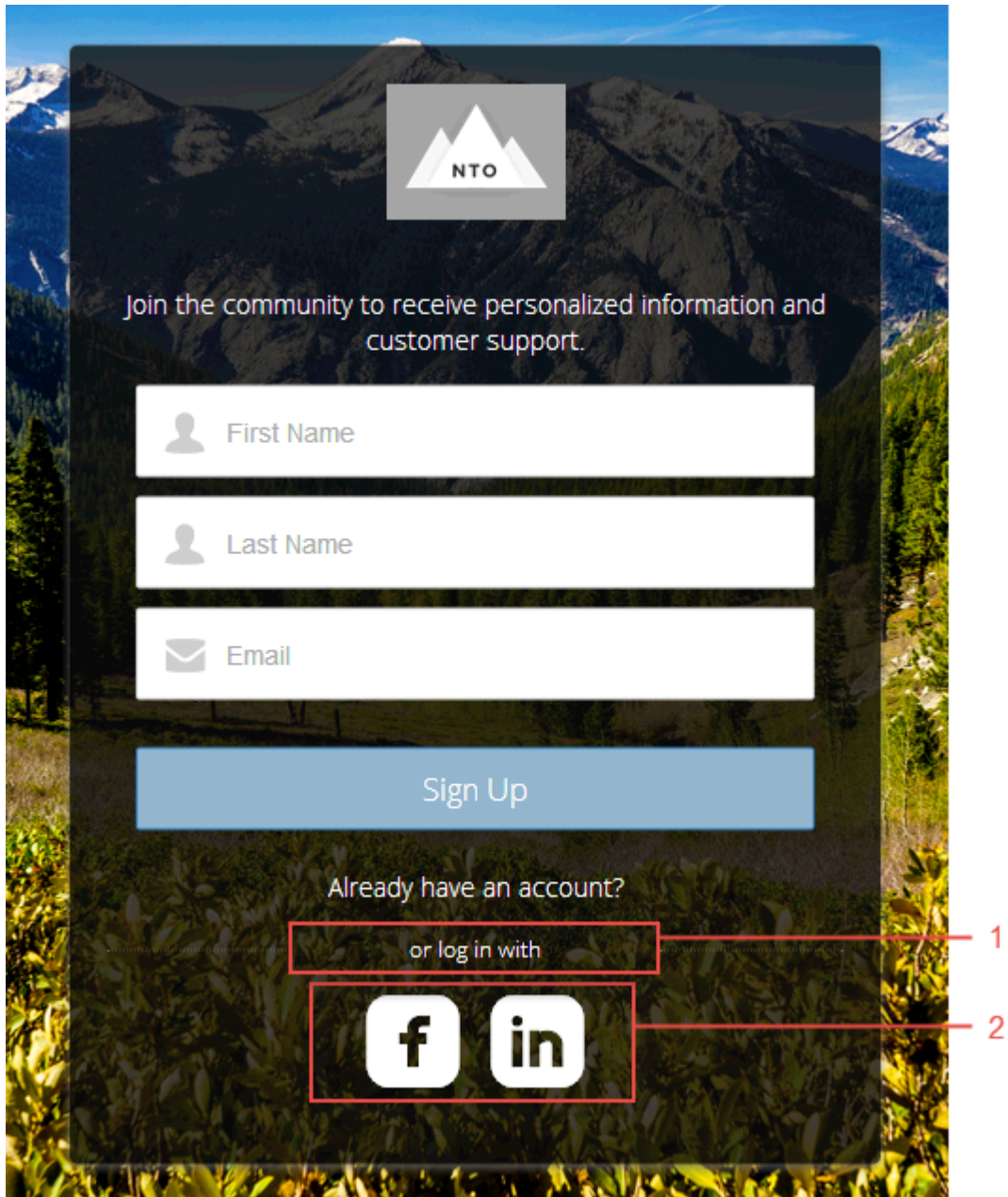
Login component to add an icon for each supported authentication provider. The user clicks the icon and logs in using the associated account's username and password.

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):



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.

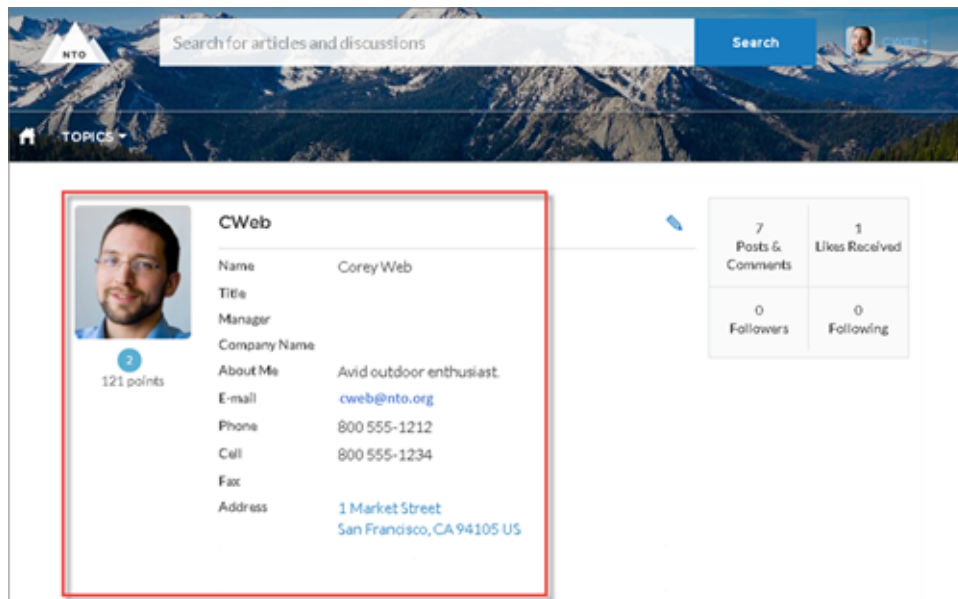
You can add the User Profile Summary component to the Profile page. This component allows users to edit their profile information from the community. When viewing another user’s profile, you can click their address to see a Google map of their location.

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:



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

ACCOUNT

Username msmith@nto.org

Email Address *

[Change Password](#)

LOCATION

Language

Locale

Time Zone

PROFILE VISIBILITY

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

Make profile public [i](#)

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

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