

Salesforce Certified Admin and App Builder

Lesson 21—Communities



What You'll Learn

- Creating a new Community and Members
- Managing Recommendations and Reputations
- Managing Tabs and Branding
- Managing Login and Registration
- Customizing Emails, Preferences, and Pages



Creating a New Community



Remember the following points:

- The first step in creating a community is checking to see if your organization has communities licenses.
- Go to Company profile and click on Company Information.
- Before you start setting up your community, it is best to make a plan.

Maximum number of active communities: 3



All Communities

New Community

Action	Community Name	Description	URL
Manage	LendingUSA		https://lendingusa.force.com

Remember the following points:

- Decide whether the target audience is customers or partners and if the community content will be public or private.
- Estimate the size of your community to determine license requirements.

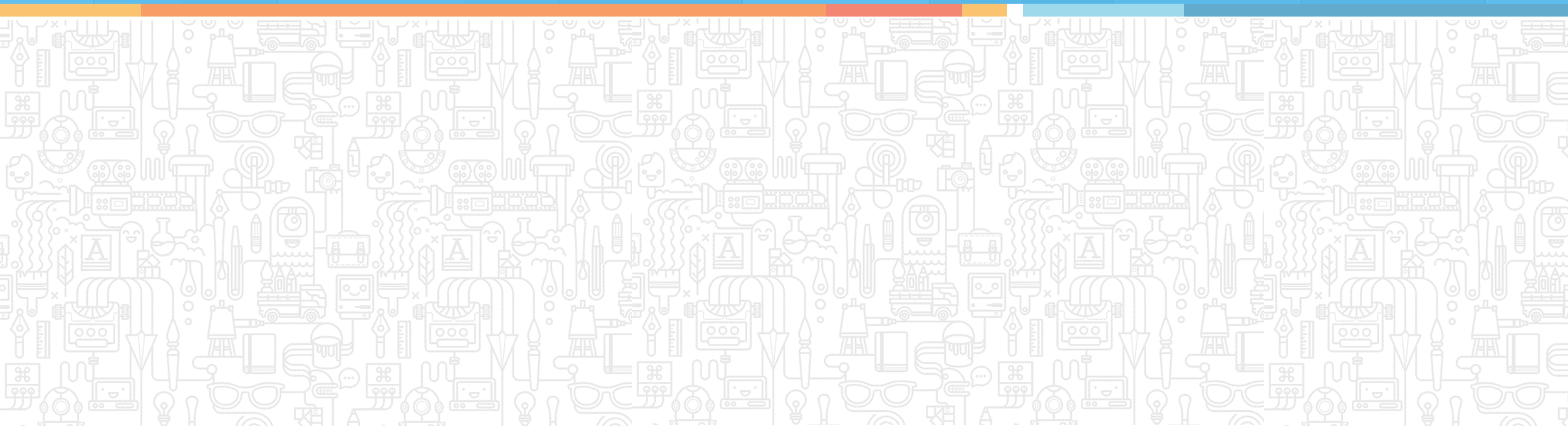
Maximum number of active communities: 3 

All Communities

[New Community](#)

Action	Community Name	Description	URL
Manage	LendingUSA		https://lendingusa.force.com

Capabilities of portals



Partner portal is the mode of communicating with partner. Partner is the stakeholder in the business who also needs to have certain access and information present in the Salesforce environment. **# The portal** is for the **p**artners who need to work with Leads, Contacts, Opportunities, and others. A special Salesforce license type is required for partner portal.



Partner Portal

Customer portal is more focused on support needs, so that your customers can interact with cases. This helps to engage with customers with better manner. Customer portal supportable objects in Salesforce are:

- Answers
- Articles
- Ideas
- Home
- Cases
- Reports
- Solutions



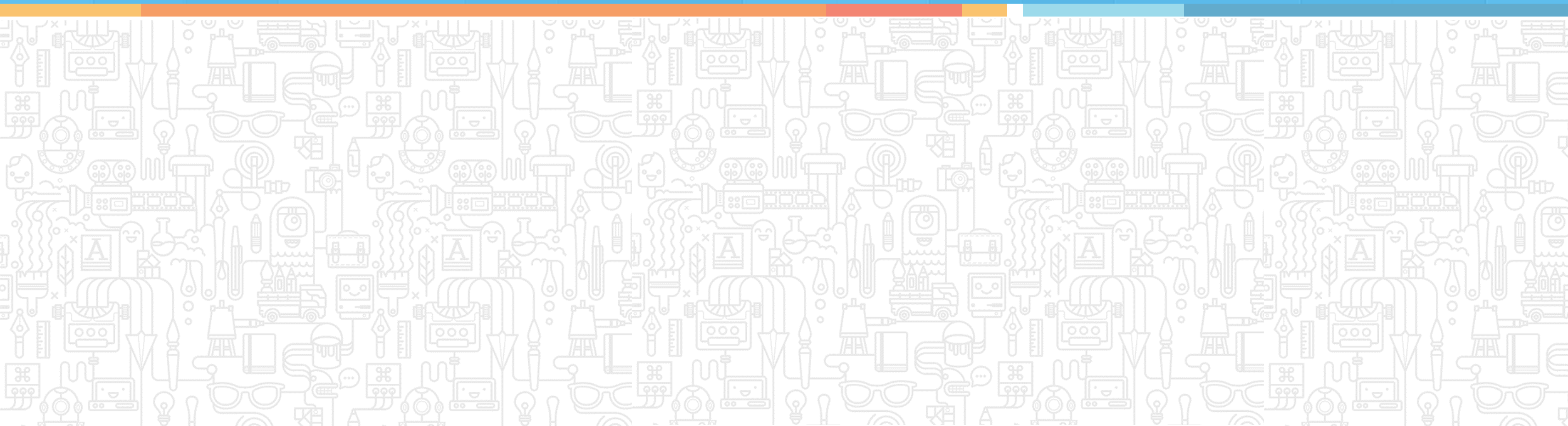
Customer Portal

- After the success of customer and partner portal, Salesforce brought 'Communities' in the market, which will benefit custom and partner portal.
- You can see only communities in the market, and not customer or partner portal.
- Communities is our next generation portal that combines the power of the Force.com platform, Site.com branding, and Chatter collaboration.
- With Communities, you can streamline key business processes and socialize them to the internal and external users you choose.



Communities

Topic Management



Keep in mind the following key points:

- Over time you will start to accumulate topics in your community.
- You can manage your topics.
- You can create, merge, rename, and delete topics in Community Management.

Fields in accounts

Save

Cancel

☒ Enable Topics

Select the text fields you want to use for topic suggestions.

Access Token

☒

Account Number

☒

Keep in mind the following key points:

- Click the gear in the global header.
- Click Topics and Topic Management.
- To create a topic click new.
- To merge a topic click merge and so on.

Fields in accounts

Save

Cancel

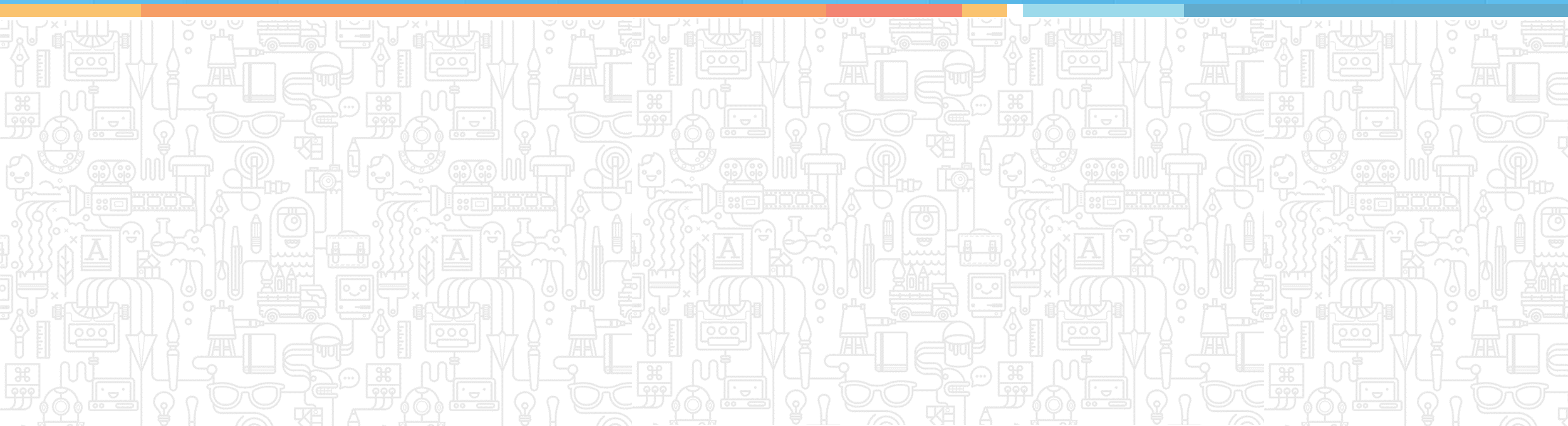
☒ Enable Topics

Select the text fields you want to use for topic suggestions.

Access Token ☒

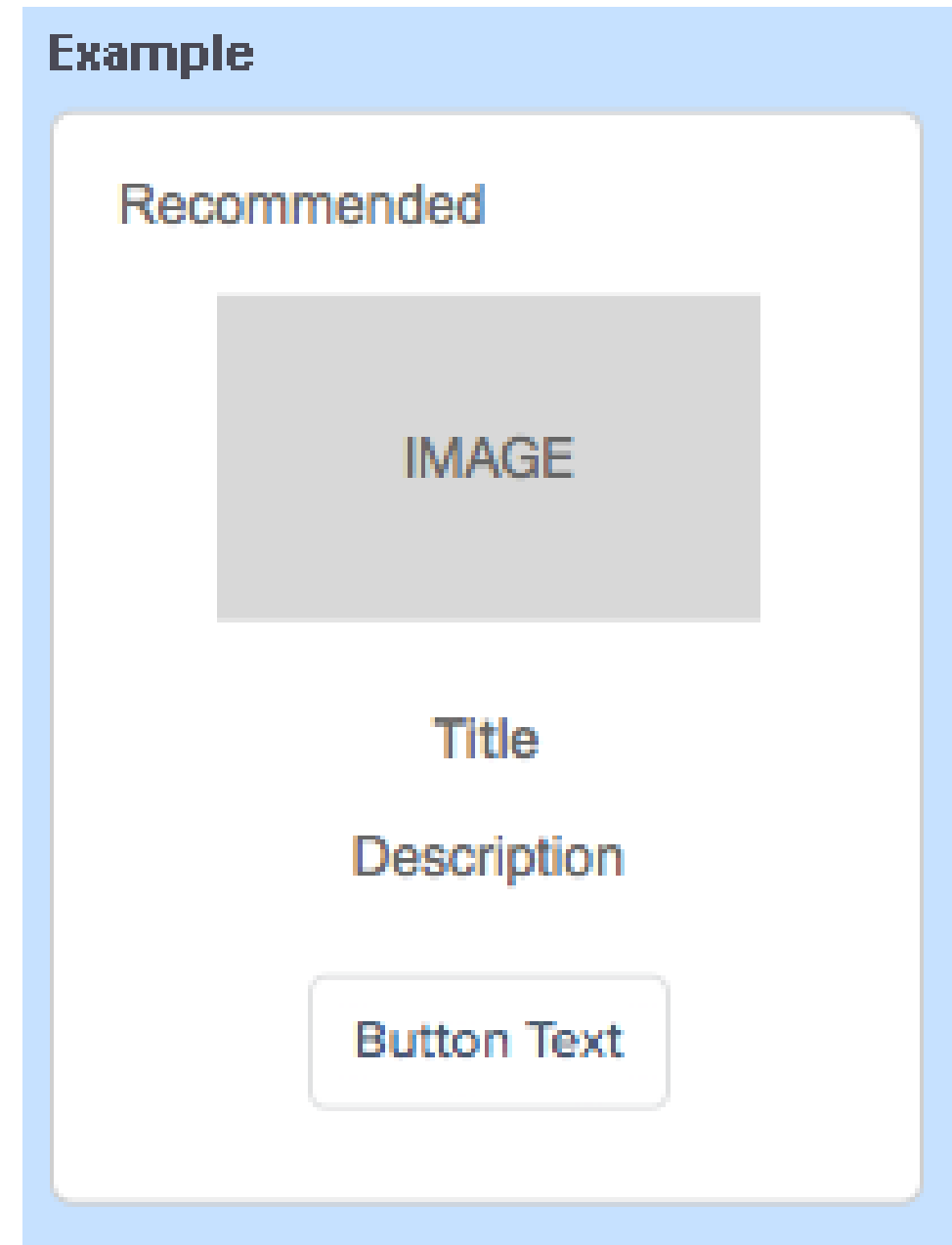
Account Number ☒

Recommendations Management



Remember the following setup steps to enable Recommendations Management:

- Recommendations encourage users to watch a video, take training, and so on.
- Access Community Management.
- Click Communities.
- Click All Communities.
- Click Manage next to the community name and then click recommendations.
- Click new.




Remember the following setup steps to enable recommendations management:

- Enter a name for the recommendation.
- Upload an image.
- Enter a title and description for the recommendation.
- Enter a label and a URL, and the button will open.
- Check Enabled so the recommendation is active.

Example

Recommended

IMAGE

Title

Description

Button Text

Reputation Management



Keep in mind the following when managing Reputation:

- Enabling Reputation turns on a default point system and reputation levels in the community.
- This will allow recognition of individual members for participation.
- A community manager can personalize labels and point values on the Community Management Page.

Reputation Levels

Save

Cancel

Level		Point Range
1	<input type="text" value="Enter level name..."/>	0 - <input type="text" value="50"/> points
2	<input type="text" value="Enter level name..."/>	51 - <input type="text" value="150"/> points

Keep in mind the following when managing reputations:

- Members gain points by performing actions.
- Actions will have assigned point values.
- Once a member exceeds the top points, they move up a level.

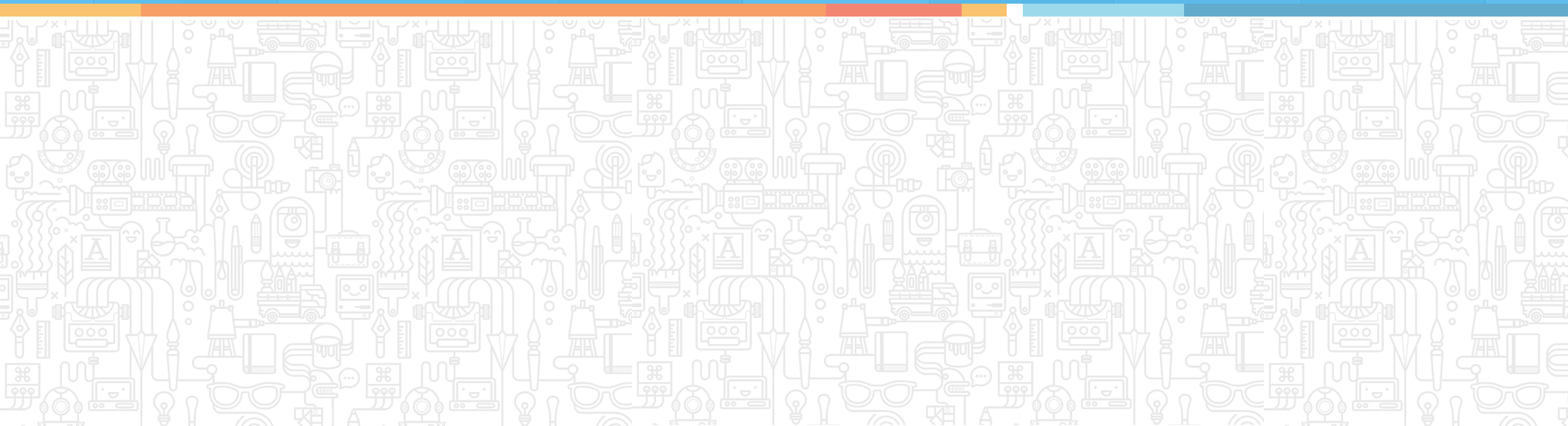
Reputation Levels

Save

Cancel

Level		Point Range	
1	<input type="text" value="Enter level name..."/>	0 - <input type="text" value="50"/>	points
2	<input type="text" value="Enter level name..."/>	51 - <input type="text" value="150"/>	points

Adding Members



Remember the following key points when adding members:

- Members are added to the community by using profiles and permission sets.
- You can remove or grant access for groups of users.
- All users assigned to a profile or permission set will become members.

Search: for:

Available Profiles		Selected Profiles
Loan Coordinator	<input type="button" value="Add"/> <input type="button" value="Remove"/>	System Administrator
Loan Processor		Chatter Free User
Loan Underwriter		Standard User
Merchant Support Specialist		Read Only
Merchant Underwriter		Solution Manager
Relations Manager		Marketing User
		Contract Manager
		Standard Platform User
		Chatter Moderator User
		Knowledge Only User
		Customer Community Login User
		Merchant Team
		LendingUSA Community

Remember the following key points when adding members:

- You can also grant access to a sub-set of the profile.
- You can enforce a membership policy.
- Click All Communities and Manage to add members.
- Select the user profiles you want to add.
- To remove a profile, select it and click remove.

Search: for:

Available Profiles		Selected Profiles
Loan Coordinator	<input type="button" value="Add"/> <input type="button" value="Remove"/>	System Administrator
Loan Processor		Chatter Free User
Loan Underwriter		Standard User
Merchant Support Specialist		Read Only
Merchant Underwriter		Solution Manager
Relations Manager		Marketing User
		Contract Manager
		Standard Platform User
		Chatter Moderator User
		Knowledge Only User
		Customer Community Login User
		Merchant Team
		LendingUSA Community

Managing Tabs and Branding



Keep the following key points in mind

when managing tabs and branding:

- If you are using the pre-configured templates, Tabs are hidden by default.
- Click Administration, then Preferences.
- Click All Settings in Community Management.

Colors

Select color scheme ▼

Header Background



#51606E

Page Background



#B1BAC1

Keep the following key points in mind when managing tabs and branding:

- Choose the features you want your community to see.
- Choose these tabs during set-up.
- Go back to Communities and Click Manage.
- Click Administration and Tabs. Click Add.

Colors

Select color scheme ▼

Header Background



#51606E

Page Background



#B1BAC1

Login and Registration



Remember the following points when setting up Login and Registration:

- You can enable self-registration to have unlicensed guests join your community.
- The new members can be saved as a contact or create a person account.
- There is a Visualforce page and Apexcontroller that are associated with your community.

Login

Choose a login page.

Community Builder Page

login

External users can login or register with: [i](#)

☒ LendingUSA username and password

To configure more login options, go to [Single Sign-On Settings](#) or [Auth. Providers](#). [i](#)

Logout

Enter a URL for your logout page.

URL

[i](#)

Remember the following points when setting up Login and Registration:

- The Visualforce page provides a form for your guests to register.
- Go to All Communities and click Manage next to the community name.

Login

Choose a login page.

Community Builder Page

login

External users can login or register with: [i](#)

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To configure more login options, go to [Single Sign-On Settings](#) or [Auth. Providers](#). [i](#)

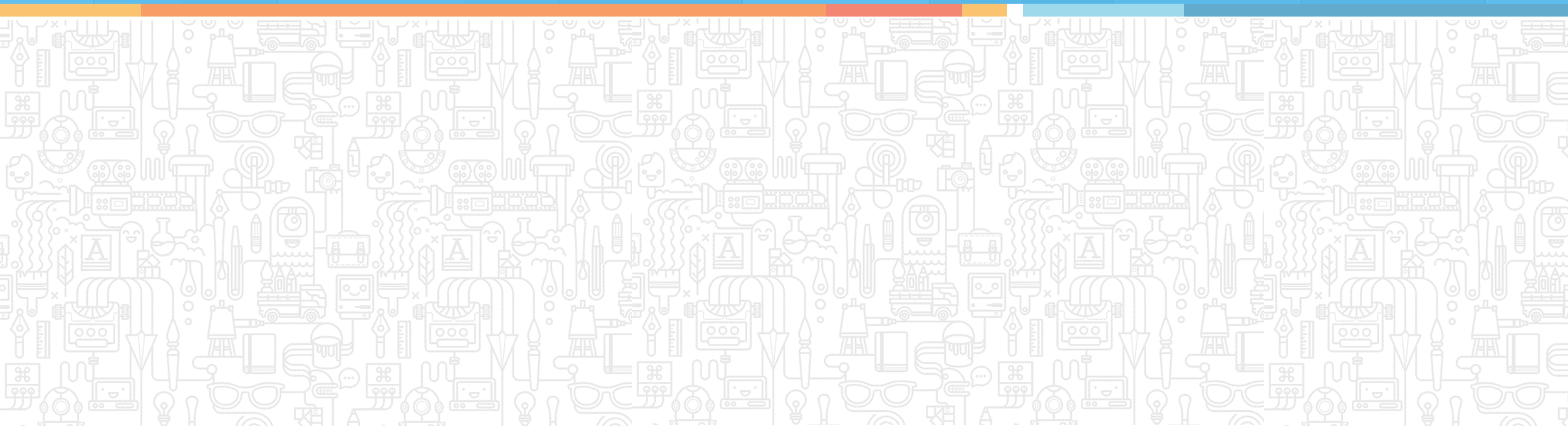
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Enter a URL for your logout page.

URL

[i](#)

Community Preferences



Keep in mind the following key points when accessing emails, preferences, and pages:

- Email sender information, Chatter email, and templates can be customized for your community.
- Perform customizations in the user interface or the Network object.
- Click All communities, click Manage, Click Administration, Emails.

Preferences

General

- ☒ Enable nickname display
- ☒ Allow access without login
- ☒ Enable private messages
- ☐ Use custom Visualforce error pages
- ☐ Show all settings in Community Management

Community Management

- ☐ Allow members to flag content
- ☒ Enable setup and display of reputation levels
- ☐ Enable knowledgeable people on topics

Keep in mind the following key points when accessing emails, preferences, and pages:

- Enter custom values for the email sender's name and address to replace the default values.
- Customize the display in the Chatter email footer.
- Select Send a Welcome email to be send to users when they are added to the community.
- You can customize any default templates.

Preferences

General

- ☒ Enable nickname display
- ☒ Allow access without login
- ☒ Enable private messages
- ☐ Use custom Visualforce error pages
- ☐ Show all settings in Community Management

Community Management

- ☐ Allow members to flag content
- ☒ Enable setup and display of reputation levels
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QUIZ 1

What licenses are required to setup a Community?

- a. System Administrator
- b. Contract Administrator
- c. Communities Licensing
- d. Chatter Free



QUIZ

1

What licenses are required to setup a Community?

- a. System Administrator
- b. Contract Administrator
- c. Communities Licensing
- d. Chatter Free



The correct answer is **c**.

You need to purchase Communities licensing from Salesforce to setup a Community.

QUIZ 2

Communities members are added from _____.

- a. Leads
- b. Opportunities
- c. Cases
- d. Contacts or Accounts



QUIZ 2

Communities members are added from _____.

- a. Leads
- b. Opportunities
- c. Cases
- d. Contacts or Accounts



The correct answer is **d**.

Communities members are added from Contacts or Accounts in Salesforce.

QUIZ 3

What are the other available methods of logging in?

- a. Using Google username and password
- b. Using Facebook username and password
- c. SSO and OAuth
- d. API



QUIZ 3

What are the other available methods of logging in?

- a. Using Google username and password
- b. Using Facebook username and password
- c. SSO and OAuth
- d. API



The correct answer is **c**.

SSO and OAuth are the other methods for logging in.

QUIZ 4

What is the function of the Tab page in Communities?

- a. Creating new tabs
- b. Deleting tabs
- c. Exposing tabs
- d. Creating a custom object



QUIZ 4

What is the function of the Tab page in Communities?

- a. Creating new tabs
- b. Deleting tabs
- c. Exposing tabs
- d. Creating a custom object



The correct answer is **c**.

The tabs page allows a System Administrator to expose tabs to the community.

QUIZ 5

Which of the following options is not available in Communities preference?

- a. Enable nickname display
- b. Allow access without login
- c. Use custom Visualforce error pages
- d. Disable users



QUIZ 5

Which of the following options is not available in Communities preference?

- a. Enable nickname display
- b. Allow access without login
- c. Use custom Visualforce error pages
- d. Disable users



The correct answer is **d**.

You can't disable users from the Communities preferences page.



Case Study

Scenario

Analysis

Solution

United Containers has a large customer service team that receives 5,000 tickets each day from customers. The tickets are billing questions, technical questions, and so on. United Containers is looking for a way to cut costs but provide a better support experience to customers. Currently, there is no portal or online forum for customer's self-help.

Scenario

Analysis

Solution

United Containers decided to purchase and setup Communities for the following reasons:

1. Communities can be configured with branding and outside user access.
2. Flexible pay per use licensing model.
3. Tight integration with Salesforce, including record-sharing and report viewing.

Scenario

Analysis

Solution

United Containers took the following steps to implement their Community:

1. Communities licenses were purchased from Salesforce.
2. A new community called “Customers First!” was created.
3. Tabs and branding were customized to match the company’s logo and colors.
4. Existing customer contacts were invited to register and login to the Community.
5. Groups were established based on common topics.

Key Takeaways

- Salesforce Communities offers fast collaboration.
- Administrators can implement groups quickly.
- Customers can interact in a secure environment.



This concludes 'Communities.'

The next lesson is 'Change Sets and Deployment.'