Getting Started With Communities

Salesforce, Spring '15

@salesforcedocs

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CONTENTS

INTRODUCTION TO 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.

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.

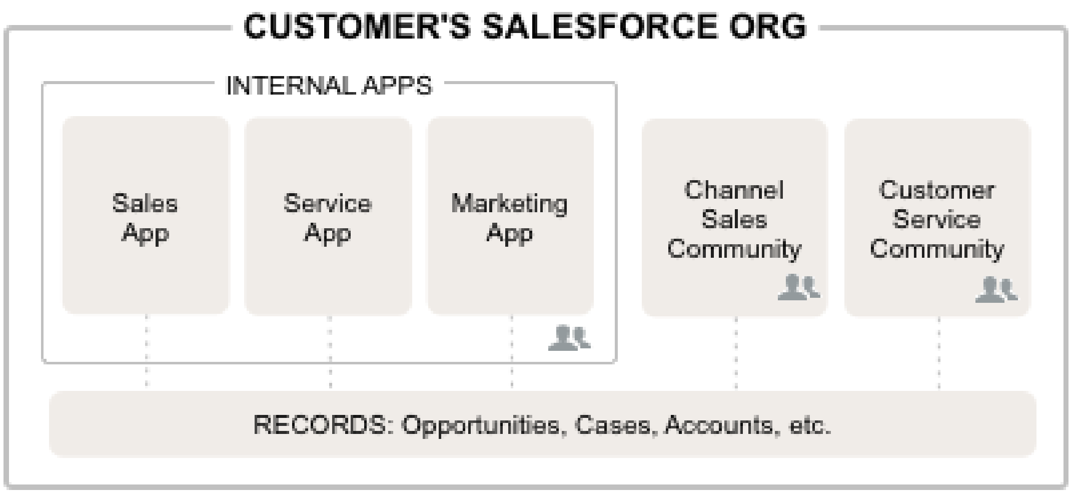
You can use Communities to:

- 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

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 specifically dedicated to an upcoming event.

Communities may contain a subset of features and data available in your internal Salesforce organization and can be customized to use your company branding. In addition, you can choose which members from your company and which customers, partners, or other people outside your company can join.

Communities live inside your organization and are easily accessed from a drop-down menu in the top left corner of Salesforce or in the Salesforce1 Mobile Browser App. Use this menu to switch between your communities and your internal Salesforce organization.



PLANNING AHEAD

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

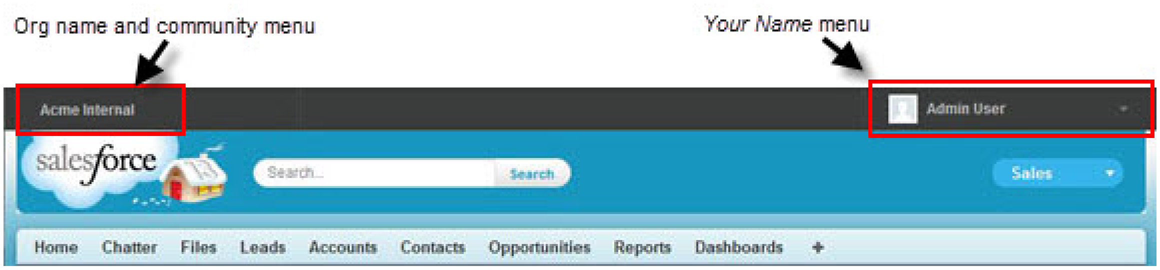
- Determine the business requirements of the community. What types of users are you creating the community for? You could start by identifying the main use cases you want to support, such as customer support, self-service, or marketing.
- Estimate the size of the community. This will help determine your licensing requirements.
- Decide if you want your community content to be publicly available to guest users without licenses
- Plan the look-and-feel of your community and then evaluate the available customization options. With Communities, you have the following choices:
  - **Use Visualforce to customize the out-of-the-box community tabs**: Communities comes with some out-of-the-box branding themes that you can use along with standard Salesforce tabs in your community. In addition, you can use Visualforce to extensively customize your community's appearance and leverage all the capabilities of the Force.com platform. This option requires programming capabilities.
  - **Use the Community Builder with templates**: The Community Builder comes with rich, stylized templates for self-service communities targeted at customer support scenarios. Templates allow for a quick rollout of a self-service community, allow easy customization via a GUI, and don't require programming experience or knowledge of the Force.com platform.
  - **Use the Community Builder (Site.com Studio) without templates**: Site.com provides a visual interface that lets you customize your community and create custom pages. Note that access to Site.com functionality is now via the Community Builder.

  For more information about these options, see Choosing Between Community Builder (Site.com) and Force.com Sites

PREREQUISITES

Before you enable Communities:

- Ensure that your organization has Communities licenses. From Setup, click **Company Profile** > **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.



SET UP YOUR FIRST COMMUNITY

This list assumes you're setting up a community using the Salesforce Tabs + Visualforce template. The steps may vary if you're using a different template.

To get started using Communities, perform the following basic setup. Once you complete these steps, you can perform advanced customizations.

1. Enable Communities in your organization
2. Create a community
3. Add members
4. Add tabs so that members see the appropriate features[1]
5. Use out-of-the-box branding options to change the look-and-feel[2]
6. Customize the login page that external users see when accessing your community
7. Determine sender information, Chatter email branding, and templates for your community emails
8. Use Community Management to set up dashboards, reputation, and topics
9. Create community users

To learn more about using the Kokua, Koa, and Napili templates, see the *Community Templates for Self-Service Implementation Guide*.

To learn more about using the Aloha template, see the *Identity Implementation Guide*.

Enabling Salesforce Communities

EDITIONS

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

To enable Communities:

- "Customize Application"

Enabling Communities enables the new user interface theme, which updates the look and feel of Salesforce.

Note: Once you enable Communities, you can't turn it off.

If your organization's access to Communities is suspended for non-payment of fees due, all of your communities are deactivated, including those in `Preview` status. When Communities is enabled again, all communities are in `Inactive` status. You can activate these communities, but can't return them to `Preview` status.

1. From Setup, click **Customize** > **Communities** > **Settings**.
2. Select **Enable communities**.
3. Select a domain name to use for your communities, then click **Check Availability** to make sure it's not already being used.

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

[1] Applies for Salesforce Tabs + Visualforce template and Salesforce1 only.
[2] Applies for Salesforce Tabs + Visualforce template and Salesforce1 only.

Important: Keep in mind that you can't change the domain name after you save it.

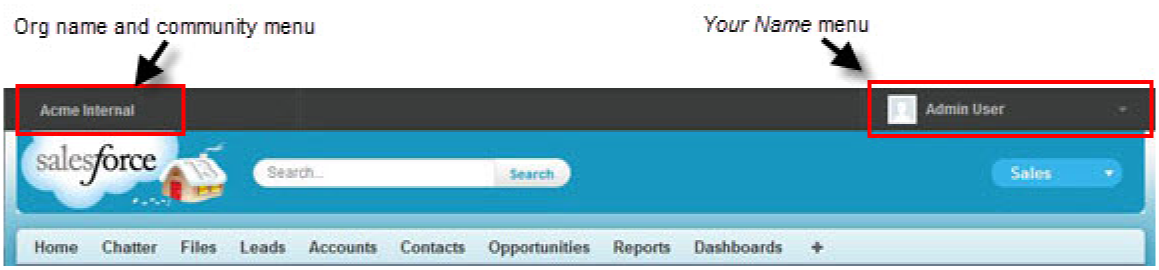
You can designate a completely custom domain by entering it in on the Domain Management page. From Setup, click **Domain Management** > **Domains**.

4. Click **Save**.

You can now create communities.

The "Create and Set Up Communities" permission is required to create and customize communities. It also gives the user the ability to manage the Site.com site associated with the community.

After enabling Communities, we recommend that you give the "View Global Header" permission to internal users who need access to the community. The global header allows users to easily switch between their internal organization and any communities they're a member of.



Setting the Default Number of Community Roles

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

If your community is set up with Partner Community or Customer Community Plus user licenses, these settings apply. By setting the number of roles, you can limit the number of unused roles. The limit is three roles; the system default is one.

For example, if three partner roles are currently created when an account is enabled for your community—Executive, Manager, and User—but you need only the User role for new accounts, you can reduce the number to one role. For better performance, we recommend setting this value to `1`. You can then use Super User Access to grant specific users access to data owned by other users in their account.

To set the number of roles:

1. Click **Customize** > **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.

EDITIONS

Available in:
- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

To set the number of default roles:
- "Customize Application"

Enabling Super User Access in Communities

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

EDITIONS

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

To enable Super User Access:

- "Customize Application"

If your community is set up with Partner Community user licenses, this setting applies. You can also grant super user access to users with Customer Community Plus licenses. For more information, see Grant Super User Access to Customer Users in Your Community on page 34.

Granting super user access to external users in your community lets them access additional data and records, regardless of sharing rules and organization-wide defaults. Super users have access to data owned by other partner users belonging to the same account who have the same role or a role below them in the role hierarchy. Super user access applies to cases, leads, custom objects, and opportunities only, but external users have access to these objects only if you exposed them using profiles or sharing and added the tabs to the community during setup.

1. Click **Customize** > **Communities** > **Settings**.
2. Select `Enable Partner Super User Access`.
3. Click **Save**.

You can now assign super user access.

To disable super user access, deselect `Enable Partner Super User Access`. If you re-enable this feature, all users who were assigned super user access before the feature was disabled will automatically get super user access again.

Granting High-Volume Community Users Access to Records

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

EDITIONS

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

To grant high-volume community users access to records:

- "Customize Application"

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 an 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 another 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. Click **Customize** > **Communities** > **Settings**.
2. In the Sharing Sets related list, click **New** to create a sharing set, or click **Edit** next to an existing sharing set.
3. In the Sharing Set Edit page, fill in the **Label** and **Sharing Set Name** fields. **Label** is the sharing set label as it appears on the user interface. **Sharing Set Name** is the unique name used by the API.
4. Enter a description.
5. Select the profiles of the users to whom you want to provide access.
6. Select the objects you want to grant access to.

   The Available Objects list excludes:

- Objects with an organization-wide sharing setting of Public Read/Write
- Custom objects that don't have an account or contact lookup field

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

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

8. Grant access based on an account or contact lookup:
   - Select a value in the User drop-down list to determine the account or contact lookup on the user.
   - Select the 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

Sharing Records Owned By High-Volume Community Users

EDITIONS

Available in:
- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

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

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. Click **Customize** > **Communities** > **Settings**.
2. In the Sharing Settings for High-Volume Community Users related list, click **Edit** next to an existing sharing set.
3. Click the Share Group Settings tab.
4. Click **Activate** to turn on the share group.

   Activating the share group can take a while. An email is sent to you when the process finishes.

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

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

About High-Volume Community Users

EDITIONS

Available in:
- Enterprise
- Performance
- Unlimited
- Developer

High-volume community users are limited-access users intended for organizations with many 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.

Administrators can create sharing sets to grant high-volume community users additional access to records; see Granting High-Volume Community Users Access to Records.

Limitations

- High-volume community users can't manually share records they own or have access to.
- You can't transfer cases from non-high-volume community users to high-volume community users.
- High-volume community users can't own accounts.
- You can't add case teams to cases owned by high-volume community users.
- You can't include high-volume community users in:
  - Personal groups or public groups.

- Sharing rules.
- Account teams, opportunity teams, or case teams.
- Salesforce CRM Content libraries.

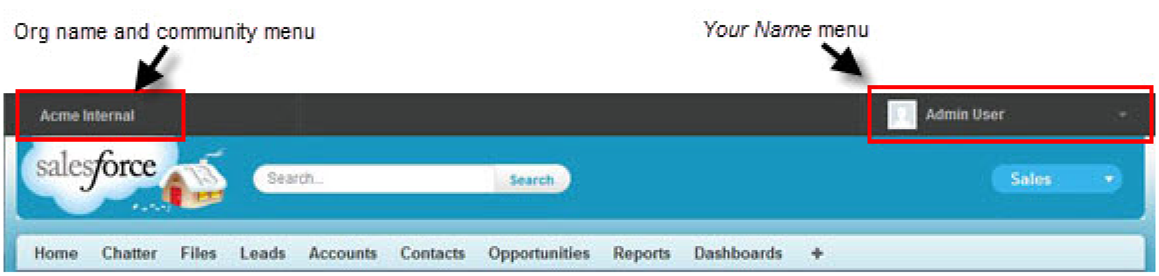
These limitations also apply to records owned by high-volume community users.

- You can't assign high-volume community users to territories.

Enabling the Global Header for Communities

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

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



The menu on the left lets users switch between their internal organization and any communities they're a member of. Internal users who aren't members of any community just see the company name. External users see the drop-down menu only if they belong to more than one active community.

The `Your Name` menu on the right side contains links to edit your 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.

Starting in Winter '14, the `View Global Header` permission is disabled by default for all standard profiles, even when you enable Communities. To view the global header, users must be assigned the "View Global Header" permission. Create permission sets to easily assign this permission to the right people.

1. From Setup, click **Manage Users** > **Permission Sets**.
2. Click **New** and create a permission set that includes the System Permission `View Global Header`.
3. Go to **Manage Users** > **Users** and assign the permission set to the appropriate users.

Users with the permission set see the global header at the top of all pages.

Creating Communities

The number of communities you can create for your organization is listed on the Communities page in Setup. `Inactive` communities don't count against this limit. If you want to increase the number of communities in your organization, contact your Salesforce account executive.

EDITIONS

Available in:
- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

To create, customize, or activate a community:
- "Create and Set Up Communities"

  AND

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

1. To start creating communities, click **Customize** > **Communities** > **All Communities**, then click **New Community**.
   The template wizard appears, with different template options for you to choose from.
2. Hover over a template to see more information about it.

   Kokua
   A visually rich, responsive self-service template that lets users search for and view articles or contact support if they can't find what they're looking for. Supports Knowledge and Cases.

   Koa
   A text-based, responsive self-service template that lets users search for and view articles or contact support if they can't find what they're looking for. Supports Knowledge and Cases.

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

   Aloha
   A configurable App Launcher template that lets users quickly find applications and access them using single sign-on authentication. For more information, see Getting Started with Community Templates for Salesforce Identity.

   Salesforce Tabs + Visualforce
   Standard Salesforce structure and tabs that you can customize using Visualforce. Supports most standard objects, custom objects and Salesforce1.

3. Hover over the template you want to use, and then click **Choose**.
4. If you selected Koa or Kokua, specify the categories and Company Name for your template, then click **Next**.

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

   Top Level Category
   This is the highest-level category that you want to display. Only the children of this category appear in the community. You can have several nested layers of categories above this category, but the page will show this category as the parent and show its subcategories as children.

   Company Name
   This is the name of your company as you want it to appear in the header of the single-page application.

5. Enter a community name.

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

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

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

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

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

7. Click **Create Community**.
   The community is created in `Preview` status.

8. On the confirmation page, click **Go to Community Management** to customize your community. If you chose a template other than Salesforce Tabs + Visualforce, you can customize your community in Community Builder. Community Builder is easily accessible from Community Management.

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

Communities Statuses

EDITIONS

Available in:
- Enterprise
- Performance
- Unlimited
- Developer

Communities can have one of the following statuses.

Status	Description
`Preview`	Customization of the community isn't complete, and the community has never been activated. Once you activate a community, you can't go back to `Preview` status. Users with "Create and Set Up Communities" can access communities in `Preview` status if their profile or permission set is associated with the community. They can also share a link to these communities with users whose profiles or permission sets are associated with the community. The link for sharing a `Preview` community is located on the Community Management page. No welcome emails are sent even if `Send welcome email` is selected. Note: If your organization's access to Communities is suspended for non-payment of fees due, all of your communities are deactivated, including those in `Preview` status. When Communities is enabled again, all communities are in `Inactive` status. You can activate these communities, but can't return them to `Preview` status.
`Inactive`	The community was previously `Active` but was deactivated. You may want to deactivate a community if you need to: • Add or remove members • Add, remove, or change the order of tabs • Change the color scheme • Change the community URL

Status	Description
	When you deactivate a community , it no longer appears in the drop-down menu. Users with "Create and Set Up Communities" can still access the setup for `Inactive` communities regardless of membership. If members try to access `Inactive` communities using a direct link, they see an error page.
`Active`	The community is active and available to members. Welcome emails are sent to new members if `Send welcome email` is selected.

Adding Members to Your Community

EDITIONS

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

To create, customize, or activate a community:

- "Create and Set Up Communities"

  AND

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

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. Access Community Management in either of the following ways:
   - From the community, click in the global header.
   - From Setup, click **Customize** > **Communities** > **All Communities**, then click **Manage** next to the community name.
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 won't be able to access the Administration settings in Community Management. To add yourself back to the community or make other membership updates, use the API.

4. To add members using permission sets:
   a. To search for a specific permission set, enter a search term and click **Find**.
   b. Select the permission sets you want to allow access to your community. Press CTRL to select multiple permission sets.
   c. Click **Add**.

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

5. Click **Save**.

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

When the community is `Active`, welcome emails are sent and the community is discoverable by members. When a community is in `Preview` status, only members with the login URL can view the community. If a community is `Inactive`, only users with the "Create and Set Up Communities" permission can access it through the Community menu, regardless of membership.

There are additional options for granting access to your community:

- Enable self-registration so that external users can register on their own
- Enable authentication providers, such as Facebook, so that external users can log into the community without creating an account

For more information about these additional options, see Customize Login, Logout, and Self-Registration in Your Community.

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 APIand Data Loader to add yourself and others to a community.

1. Get the `networkId` for your community.

   From Setup, go to **Build** > **Customize** > **Communities** > **All Communities**, 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, go to **Administer** > **Manage Users** > **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.

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

Add Tabs to Your Community

EDITIONS

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

To create, customize, or activate a community:

- “Create and Set Up Communities”

  AND

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

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

Note: You can choose to hide tabs if you want to use completely custom pages in your community. Not sure which option works best for you? Check out Tabs vs. Community Builder on page 15.

If you’re using one of the preconfigured templates instead of Salesforce Tabs + Visualforce, the **Tabs** node is hidden by default. To display the node, click **Administration** > **Miscellaneous**, then select **Show all settings in Community Management**.

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.

Remember that profiles control access to tabs, so some tabs you choose may be hidden for profiles associated with the community. In that case, you’ll need to manually expose the tabs in the profile so that those users can see the tabs in the community.

Tip: Keep in mind that the tabs you enable should be required for the type of activity you’re performing in this community, whether it be sharing accounts and opportunities with your partners or sharing cases and solutions with customers who need support. You don’t want to clutter your community with tabs that users don’t really need.

Note: Chatter Free users in your community won’t see any tabs except the Chatter tab.

1. Access Community Management in either of the following ways:
   - From the community, click in the global header.
   - From Setup, click **Customize** > **Communities** > **All Communities**, then click **Manage** next to the community name.
2. Click **Administration** > **Tabs**.
3. Select the tabs to include in your community from the Available Tabs list. Press CTRL to select multiple tabs.
4. Click **Add** to add the tab. To remove a tab, select it in the Selected Tabs list and click **Remove**.
5. Click **Up** or **Down** to change the order that the tabs display.

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

   Note: If any user doesn’t have access to the landing tab and Chatter is disabled, we show them the Home tab. If Chatter is enabled, we show the Chatter tab.
6. Click **Save**.

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

Tabs vs. Community Builder

Not sure whether to use standard Salesforce tabs or the Community Builder when setting up your community? Here is some more information about each option to help you decide.

Tabs

Selecting the Salesforce Tabs + Visualforce template when creating your community means you will use out-of-the-box Salesforce tabs or Visualforce pages.

Pros

- Some theming options available out-of-the-box for tabs
- Support for all sales, service, marketing, and platform features
- Full Force.com platform capability

Cons

- Visualforce is the preferred approach for better customization, yet Visualforce requires coding capability
- Requires some knowledge of the Force.com platform

Community Builder

Selecting one of the preconfigured templates when creating your community means that you will use the WYSIWYG user interface of the Community Builder.

Pros

- Out-of-box app targeted at self-service communities
- More CSS styles available
- Great for a quick rollout of simple self-service community use case

Cons

- Limited to self-service functionality (cases, Salesforce Knowledge, and Chatter Questions)
- Doesn't support other sales, service, or platform use cases
- Doesn't have full platform capability

Choosing a Landing Tab

If you are using the Salesforce Tabs + Visualforce template, you can select a landing tab for your community. In **Community Management** > **Administration** > **Tabs**, the first tab in 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.

If you choose to use Site.com pages instead of tabs, the Home Page selected for your community Site.com site is the first page customers see when they access the community.

Brand Your Community

EDITIONS

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

To create, customize, or activate a community:

- "Create and Set Up Communities"

  AND

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

If you are using the Salesforce Tabs + Visualforce template, you can customize the look and feel of your community in Community Management by adding your company logo, colors, and copyright. This ensures that your community matches your company's branding and is instantly recognizable to your community members.

Important: If you are using a self-service template or choose to use the Community Builder to create custom pages instead of using standard Salesforce tabs, you can use the Community Builder to design your community's branding too.

1. Access Community Management in either of the following ways:
   - From the community, click in the global header.
   - From Setup, click **Customize** > **Communities** > **All Communities**, then click **Manage** next to the community name.
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**.

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

Configure the login, logout, and self-registration options for your community that are available out-of-the-box, or customize the behavior with Apex and Visualforce or Community Builder pages.

By default, each community is associated with the default login (`CommunitiesLogin`) and self-registration (`CommunitiesSelfReg`) pages and their associated Apex controllers. You can customize the defaults in the following ways:

- 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.
- Set up self-registration for unlicensed guest users in your community.

EDITIONS

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

To create, customize, or activate a community:

- "Create and Set Up Communities"

  AND

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

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 (`CommunitiesLogin`) that comes with your community.

The header and page background colors used on the default login page are inherited from the community's branding color scheme.

1. Access Community Management in either of the following ways:
   - From the community, click in the global header.
   - From Setup, click **Customize** > **Communities** > **All Communities**, then click **Manage** next to the community name.
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.

EDITIONS

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

To create, customize, or activate a community:

- "Create and Set Up Communities"

  AND

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

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. 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.

Customize Your Community's Login Experience

Customize the default login process for external users in your community. You can also use a custom login page, support multiple authentication providers, and configure single sign-on.

External users are users with Community, Customer Portal, or partner portal licenses. Guest users are unlicensed users.

EDITIONS

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

To create, customize, or activate a community:

- "Create and Set Up Communities"

  AND

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

1. Access Community Management in either of the following ways:
   - From the community, click in the global header.
   - From Setup, click **Customize** > **Communities** > **All Communities**, then click **Manage** next to the community name.

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

   A few things to keep in mind about setting up the login process:

   - The login page you select in Community Management overrides other login page assignments in the Community Builder (Site.com Studio) 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 Napili template, the login page assigned to the community by default is called `login`. Use Community Builder (Site.com Studio) to customize its appearance.
   - To update the login behavior for both Visualforce and Community Builder pages, update the `CommunitiesLoginController` Apex controller.
   - You can opt to use a completely new custom Visualforce or Community Builder (Site.com Studio) page as your community's login page with any template. Custom Community Builder pages must be published before they can be assigned to they community. Remember to modify the `CommunitiesLoginController` Apex controller and the `Site.login()` Apex method to use your custom login page.

4. Select what credentials external users can log in or register with.

   By default, users log in using the default community username and password. If you want to allow users to log into your community with other credentials, such as their Facebook©, Janrain©, or Salesforce credentials from another organization, select those from the list.

   Important: The additional authentication provider options are available only if you enable them from Setup, in **Security Controls** > **Auth. Providers**.

5. 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.

- 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 Salesforce domain name, which changes the application URLs for all of your pages, including login pages. Contact Support if you need to enable My Domain.

You can offer multiple SAML single sign-on options if you **Enable Multiple Configs** from Setup, in **Security Controls** > **Single Sign-On Settings**. If you already had SAML enabled and you then enable multiple SAML configurations, your existing SAML configuration is automatically converted to work with multiple additional 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.

6. Click **Save**.

Your selected login options will be visible to all users on the login page. However, they're valid only for external and guest users. Internal users who try to use these options will get a login error. They must use the link that directs employees to **Log in here** and log in with their Salesforce username and password.

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, click **Develop** > **Apex Classes**.
2. Click **Edit** next to `CommunitiesLoginController`.
3. Add the following code:

USER PERMISSIONS

To create and edit Visualforce pages:
- "Customize Application"

To edit Apex classes:
- "Author Apex"

  AND

  "Customize Application"

```
global PageReference forwardToCustomAuthPage() {
       String startUrl = System.currentPageReference().getParameters().get('startURL');

        return new PageReference(Site.getPathPrefix() + '/SiteLogin?startURL=' +
EncodingUtil.urlEncode(startURL, 'UTF-8'));
     }
```

4. If you created a completely custom login page, replace `SiteLogin` with the name of your Visualforce page.
5. Click **Save**.
6. Click **Edit** next to `CommunitiesLandingController`.
7. Add the following code:

```
public PageReference forwardToCustomAuthPage() {
       String startUrl = System.currentPageReference().getParameters().get('startURL');

        return new PageReference(Site.getPathPrefix() + '/SiteLogin?startURL=' +
EncodingUtil.urlEncode(startURL, 'UTF-8'));
     }
```

8. If you created a completely custom login page, replace `SiteLogin` with the name of your Visualforce page.
9. Click **Save**.
10. From Setup, click **Develop** > **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**.

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

If you're using external authentication providers and a custom home page, you need to ensure that users who log in using those external authentication providers access 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 two methods for using a custom home page:

- Update the `CommunitiesLandingController` code to redirect to the new page:
  1. From Setup, click **Develop** > **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 new PageReference(communityUrl + customHomePage);
        }
      }
        public CommunitiesLandingController() {}
    }
```

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

- Alternatively, you can replace the Active Site Home Page with a custom Visualforce page.
  1. From Setup, click **Customize** > **Communities** > **All Communities**, then click the **Manage** button next to thecommunity name.
  2. Under Advanced Customizations, click the **Go to Force.com** link.
  3. In the Site Detail section, click **Edit**.
  4. In the `Active Site Home Page` field, select your custom Visualforce page.
  5. Click **Save**.

When a user enters the community URL, they see the new Active Site Home Page.

Redirect Community Members to a Custom URL on Logout

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

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

1. Access Community Management in either of the following ways:
   - From the community, click in the global header.
   - From Setup, click **Customize** > **Communities** > **All Communities**, then click **Manage** next to the community name.
2. Click **Administration** > **Login & Registration**.
3. In the Logout section, enter the URL you want to redirect community members to.
4. Click **Save**.

EDITIONS

Available in:
- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

To create, customize, or activate a community:
- "Create and Set Up Communities"

  AND

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

Set Up Self-Registration for Your Community

EDITIONS

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

To create, customize, or activate a community:

- "Create and Set Up Communities"

  AND

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

Enable self-registration to allow unlicensed guest users to join your community. You can choose to save them as contacts under a business account or create a person account for each self-registering user.

When you enable self-registration, these Visualforce pages and Apex controllers are associated with your community.

- `CommunitiesSelfReg` page and `CommunitiesSelfRegController`—Provide the form for partners or customers so they can register with your community. You can modify the `CommunitiesSelfRegController` Apex controller to change the default self-registration process, but it is no longer required starting with the Spring '15 release.

  Note: Apex customizations for the self-registration process take precedence over the defaults specified in Community Management. In organizations created prior to the Spring '15 release, existing Apex customizations for self-registration will continue to remain in effect as before.

- `CommunitiesSelfRegConfirm` page and `CommunitiesSelfRegConfirmController`—If a user doesn't create a password during self-registration—either because they left the password field blank or your organization customized the self-registration form to omit the password field—this page confirms that a password reset email has been sent. Users landing on this page can't log in until they reset their password.

The default self-registration pages and controllers are shared by all of your organization's communities. If you enable self-registration for multiple communities, you must further customize the self-registration experience to direct users to different pages, assign different profiles or permission sets for different communities, and so on.

1. Access Community Management in either of the following ways:
   - From the community, click in the global header.
   - From Setup, click **Customize** > **Communities** > **All Communities**, then click **Manage** next to the community name.
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, else they aren't included in the page lookup search results. Remember to modify the self-registration `CommunitiesSelfRegController` and `CommunitiesSelfRegConfirmController` Apex controllers if you use a custom page.
5. Select the default **Profile** to assign to self-registering users.

   Note: You can only select portal profiles that are associated with the community. If a profile is selected as the default for users who self-register, and you remove it from the community, the self-registration `Profile` is automatically reset to *`None`*.
6. Select the business **Account** that you want to assign self-registering users to.

   The self-registering user is assigned as a contact of the 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 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.

Customize the Community Self-Registration Process with Apex

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

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

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, click **Develop** > **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 in Community Management, the value in the Apex code will override that default.

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

4. Enter the account ID for the partner or customer account that users who self register should be associated with.

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

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

5. If you're enabling self-registration for multiple communities, add code to create appropriate types of users for each community, that is, assigning the correct profile, role, and account ID per community.

6. Click **Save**.
7. Enable access to accounts and contacts for the guest profile. The guest profile is automatically associated with your community's Force.com site.
   a. From Setup, click **Customize** > **Communities** > **All Communities**, then click **Manage** next to the community name.
   b. On the Community Management Overview page, 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, click **Develop** > **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.

Create Person Accounts for Self-Registering Users

EDITIONS

Available in:
- Enterprise
- Performance
- Unlimited
- Developer

If your business deals mostly with individuals, instead of creating them as contacts under a single business account, you can assign each self-registering user to a person account.

Important: You must have Person Accounts enabled in your organization. Only Customer Community and Customer Community Plus licenses support the creation of person accounts.

In Community Management, under **Administration** > **Login & Registration**, enable self-registration and leave the **Account** field blank. Note that you must 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, as well as 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.

Customizing Communities Email

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.

EDITIONS

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

To create, customize, or activate a community:

- "Create and Set Up Communities"

  AND

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

1. Access Community Management in either of the following ways:
   - From the community, click in the global header.
   - From Setup, click **Customize** > **Communities** > **All Communities**, then click **Manage** next to the community name.
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.

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).

   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**.

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.

Customize Recommendations in Community Feeds (Beta)

EDITIONS

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

To access the Community Management page:

- "Manage Communities"

  OR

  "Create and Set Up Communities"

For the Salesforce1 mobile browser app, create custom recommendations that appear in community feeds, encouraging users to watch videos, take training, and more. Edit these recommendations in Community Management, where they're supported for any community using the "Napili" or "Salesforce Tabs + Visualforce" template.

Note: The administrative interface for recommendations is in beta and has known limitations. For complete functionality, use the Chatter REST API.

1. From the community, click in the global header.
2. At left, click **Admistration** > **Recommendations**.
3. Click **New**.
4. Complete the following fields:
   - `Name`—Enter an internal name that aids organization of recommendations in Community Management.
   - `Image`—Enter the 15- or 18-character ID found at end of the file URL in Salesforce. (The image must first be uploaded via the Files tab or feed.)
   - `Title`—Optionally, enter header text that appears above the image in the feed.
   - `Description`—Enter detailed text that suggests what users should do.
   - `https://`—Enter the URL that the Launch button opens.

Tip: To remove an existing recommendation, in Community Management, click **Admistration** > **Recommendations**, and click the recommendation name. At the bottom of the recommendation detail page, click **Delete**.

Determining 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, click **Security Controls** > **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

Show Nicknames Instead of Full Names in the Community

EDITIONS

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

To enable nickname display:

- "Create and Set Up Communities"

  AND

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

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

All users have nicknames by default, which they can modify by going to `Your Name` > **Edit Contact Info** in the global header or from their Chatter user profile.

1. Access Community Management in either of the following ways:
   - From the community, click in the global header.
   - From Setup, click **Customize** > **Communities** > **All Communities**, then click **Manage** next to the community name.
2. Click **Administration** > **Miscellaneous**.
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.
- 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.

Enable Public Access to Community Content

Enable access to community content for guest users (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 maintained by a sports equipment manufacturer. A community with public discussions, questions, known issues, and solutions posted by customer support would allow existing and potential customers to view this information without contacting the company directly.

1. Access Community Management in either of the following ways:
   - From the community, click in the global header.
   - From Setup, click **Customize** > **Communities** > **All Communities**, then click **Manage** next to the community name.
2. Click **Administration** > **Miscellaneous**.
3. Select **Allow access without login**, then click **Save**.

Enabling public access allows you to expose groups, topics, user profiles, and feeds for guest users via Chatter in Apex, but it doesn't expose this data in the community. To allow guest users to view this information, do one of the following:

- Use a community template from the Community Builder that allows guest user access for one or more of these objects (Napili, for example). See the *Community Templates for Self-Service Implementation Guide* for detailed instructions.
- Use the Chatter in Apex methods and Visualforce pages to expose these objects to guest users. See "Methods Available to Communities Guest Users" in the *Force.com Apex Code Developer's Guide* and the *Visualforce Developer's Guide* for more information.

Note:

- If you have enabled profile-based rollout for Chatter in your organization, guest users won't be able to access your public community until you enable Chatter access on the guest user profile. For more information, see *Control Chatter Access through User Profiles* in the Salesforce Help.
- You can't attach files to questions in a public community from Internet Explorer 9.

EDITIONS

Available in:
- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

To enable public access to community content:
- "Create and Set Up Communities"

  AND

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

Set Up Search Engine Optimization (SEO) for Your Community

Have popular search engines, such as the *Google*™ search engine and the *Bing*® search engine, index your community so that customers, partners, and guest users can easily discover community pages via online searches. SEO can significantly improve discovery for public communities.

There are a few standard files you should know about when setting up SEO for your community:

robots.txt

The `robots.txt` file, a standard file used across the Web for SEO, uses include and exclude rules to inform web spiders and robots about which areas of your community to index. This file gives you complete control over what users can discover via search engines. You can customize the rules to allow your entire community to be indexed, or you can choose specific areas. Once you specify your rules, search engines use the file to index your community pages.

For Salesforce Communities, you must create a Visualforce page to host this information. This file is placed at the root level of your community. Here's an example of a Visualforce page with indexing rules for a community:

EDITIONS

Available in:
- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

To create a Visualforce page, robots.txt file, and sitemap.xml file for your community:
- "Create and Set Up Communities"

```
<apex:page contentType="text/plain">
User-agent: *
Disallow: /   # hides everything from ALL bots
Allow: /<path-prefix-1>/s  # add path you want to open to bots
Allow: /<path-prefix-2>/s  # add path you want to open to bots
Sitemap: http://community_URL>/<sitemap_to_community1>
Sitemap: http://<community_URL>/<sitemap_to_community2>
</apex:page>
```

sitemap.xml

The `sitemap.xml` file contains a list of the URLs of your community. Search engines use this list to find out which pages of your community are available for crawling and indexing. The robots.txt file contains the path to your community's sitemap. The `sitemap.xml` should also be placed at the root level of your community. For more information about creating the `sitemap.xml` file for your community, see this article.

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

1. Create a list of include and exclude rules for the different areas of your community that you want to expose or hide from search engines. Save this information in a text file.
2. In Setup, go to **Develop** > **Pages** and click **New** to create a new Visualforce page. Give it any name; you can even call it `robots`.
3. Paste the list of indexing rules in the Visualforce page. The final contents should look similar to the example above, with more rules as required.
4. Click **Save**.
5. Back on the Community Management page for your community, click **Go to Force.com** and then **Edit** on the Site Details page.
6. In the **Site Robots.txt** field, enter the name of the Visualforce page you just created, or click to search for the file.
7. Click **Save**.

8. Optionally, submit your `sitemap.xml` file directly to search engines. For example, submit the file to Google™ Webmaster Tools and Bing® Webmaster Tools to allow users of those search engines to discover content in your community.

To confirm that the `robots.txt` file is available for robots and spiders, navigate to your community and append `/robots.txt` to the landing page URL. You should see the contents you pasted into the Visualforce page you created earlier. Similarly, append `/sitemap.xml` to your community URL to test if your sitemap is available to search engine spiders and robots.

Creating Communities Users

To allow an external user to access your community, you must enable the external user's contact record as a customer user or partner user, depending on their license type. Your community can contain users with Partner Community, Customer Community, and Customer Community Plus licenses.

Keep in mind that if your organization has person accounts, they can't be used as partner accounts and you can't create partner users that are associated with them. Only business accounts can be used as partner accounts.

EDITIONS

Available in:
- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

To create partner users:
- "Manage External Users"

To create customer users:
- "Manage External Users"

  OR

  "Edit Self-Service Users"

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

To log in as an external user:
- "Manage Users"

  AND

  "Edit" on Accounts

1. To create partner users:
   a. View the external account you want to create a user for.
   b. Create a new contact. Click **New Contact** from the Contacts related list. Fill in the appropriate details, then click **Save**.

      Note: Partner contacts can't be owned by a non-partner account.

      Partner users can't be owned by person accounts.

   c. On the contact detail page, click **Manage External User**, then **Enable Partner User**.
   d. Edit the user record for this external user.
      - Select the Partner Community user license.
      - Select the appropriate profile. Remember that profiles give users access to tabs in your community, so be sure you choose a profile that has the appropriate tabs exposed.

        Note: The available profiles for external users are limited to the Partner Community User profile or profiles cloned from it. Unlike a standard user, the partner user role is automatically assigned based on the account name. The partner user role is a subordinate of the account owner's role, therefore, all data for the partner user role rolls up to the partner account owner's role. 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.

      - Deselect **Generate new password and notify user immediately** so that users don't receive a password before the community is activated. When you activate the community, the user will receive a welcome email with their login information, as long as the `Send welcome email` option is selected for the community.

        Note: If you select this option, but your organization doesn't have any `Active` communities that the user is a member of, Salesforce doesn't send an email with login information.

        If `Send welcome email` is disabled for your community, the user won't receive an email with their username and password. You must manually send them the information.

e. Click **Save**.

Note: Creating an external user with a Customer Community Plus license is similar to creating a partner user. On the contact record, you must select **Manage External User**, then **Enable Partner User**. Additionally, when editing the user record, you select the Partner Community User profile or a profile cloned from it.

2. To create customer users:
   a. Create a new contact.
   b. On the contact detail page, click **Manage External User**, then **Enable Customer User**.
   c. Edit the user record for this external user.
      - Select the appropriate profile. The available profiles are limited to the Customer Community User profile and any profiles cloned from it.

        Remember that profiles give users access to tabs in your community, so be sure you choose a profile that has the appropriate tabs exposed.
      - Deselect **Generate new password and notify user immediately** so that users don't receive a password before the community is activated. When you activate the community, the user will receive a welcome email with their login information, as long as the `Send welcome email` option is selected for the community.

        Note: If you select this option, but your organization doesn't have any `Active` communities that the user is a member of, Salesforce doesn't send an email with login information.

        If `Send welcome email` is disabled for your community, the user won't receive an email with their username and password. You must manually send them the information.
   d. Click **Save**.

   Note: Customer Users don't see the Notes & Attachments related list on accounts or contacts.

To troubleshoot issues or ensure 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 into the community on behalf of the external user.

Note: 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. Additionally, if an external user who is only a member of one `Active` community is given the URL for `Preview` community, they won't see the drop-down menu when in the `Preview` community.

Consider the following when creating external users.

- External users can't be deleted. If you no longer want an external user to have access to a community, deactivate the user.

Enable Cases for Communities Users

EDITIONS

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

To enable cases for Communities users:

- "Manage Profiles and Permission Sets"

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

When you enable cases for external users in your community, you can assign cases to those members. Additionally, external members can edit cases, create new cases, add case comments, reassign cases, find case solutions, and create case teams. External users can't edit case comments, associate assets with cases, or delete cases.

Note: Case comments added by external users in communities are public and can be viewed by any user that can view the case.

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

Delegating External User Administration

EDITIONS

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

To manage external users:

- "Manage External Users"

To create, edit, and delete profiles:

- "Manage Profiles and Permission Sets"

You can delegate user administration to external users so that they can decide who should access the community.

External users who are delegated administrators can:

- Create external users
- Edit external users
- Reset passwords for external users
- Deactivate existing external users

You can grant delegated external user administration rights to users with Partner Community, Gold Partner, Enterprise Administration, and Customer Portal Manager licenses.

1. From Setup, click **Manage Users** > **Profiles** and click a custom profile.

   You can't edit standard profiles.

   You can add `Delegated External User Administrator` to a permission set that you assign to a standard profile.
2. Click **Edit**.
3. Select `Delegated External User Administrator`.
4. Click **Save**.
5. Click **Edit** in the Delegated External User Profiles related list.
6. Select the profiles you want users with this profile to be able to administer.
7. Click **Save**.

Consider the following when setting up delegated external user administration.

- You can also grant delegated administration rights using permission sets.
- On the profile you're granting delegated administration rights to:
  - Add the "Create" and "Edit" permissions on contacts so that delegated administrators can create and update contacts related to their account.
  - Set the Accounts and Contacts tab settings to Default On so that delegated administrators can view the Accounts and Contacts tabs and easily manage contacts related to their accounts.
- Add the Accounts and Contacts tabs to your community.
- Set field level security and page layouts so that delegated external user administrators can access only the account and contact fields you specify.

Grant Super User Access to Partner Users in Your Community

Partner Super User Access must be enabled in your Communities Settings before you can grant access to users. Use this information to grant super user access to users with Partner Community licenses. You can also grant super user access to users in your community with Customer Community Plus licenses. To learn more, see Grant Super User Access to Customer Users in Your Community.

Granting super user access to external users in your community lets them access additional data and records, regardless of sharing rules and organization-wide defaults. Super users have access to data owned by other partner users belonging to the same account who have the same role or a role below them in the role hierarchy. Super user access applies to cases, leads, custom objects, and opportunities only, but external users have access to these objects only if you exposed them using profiles or sharing and added the tabs to the community during setup.

1. View the contact record for the user.
2. Click **Manage External Account**, then choose **Enable Super User Access**.
3. Click **OK**.

Grant Super User Access to Customer Users in Your Community

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

You can only grant customer super user access to users with Customer Community Plus licenses.

To grant super user access to users with Partner Community licenses, see Grant Super User Access to Partner Users in Your Community.

The "Portal Super User" permission lets delegated external user administrators do the following for their own account:

- View, edit, and transfer all cases
- Create cases for contacts
- View and edit all contacts, whether communities-related or not
- View account details when they're the contact on a case
- Report on all contacts, whether portal enabled or not, if the Reports tab is added to your community and the user has the "Run Reports" permission

Add the "Portal Super User" permission to a permission set and assign it to Customer Community Plus users so that they have access to their account and can view and edit all of its cases and contacts without having the ability to manage other external users.

1. From Setup, click **Manage Users** > **Permission Sets**.
2. Either create or clone a permission set.
3. In the App Permissions section, add the "Portal Super User" permission.

4. Click **Save**.
5. Assign the permission set to your Customer Community Plus users by clicking **Manage Assignments** and then adding the appropriate users.

Make Your Communities Active

Activating a community makes it visible to members. You can customize the community while it's active, or you can deactivate the community to make your changes. Keep in mind that once a community is active, everything in the community is visible to members. Be sure to finish all major customizations while in `Preview` status.

Note: If welcome emails are enabled, an email with a link to the community is sent to each member when you first activate the community. For any members from outside the company who don't have a password or use single sign-on, the welcome email includes a link to set their password and security question.

An external user with access to multiple communities within one organization uses the same login credentials for all communities.

1. Access Community Management in either of the following ways:
   - From the community, click in the global header.
   - From Setup, click **Customize** > **Communities** > **All Communities**, then click **Manage** next to the community name.
2. Click **Activate**.
   Your community is active and online.

EDITIONS

Available in:
- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

To create, customize, or activate a community:
- "Create and Set Up Communities"

  AND

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

Community Management

Manage Your Community

The Community Management page is one-stop shop for setting up and monitoring your community. Administrators can manage basic setup information including membership and branding. Community managers can view dashboards about groups, members, feed activity, and license usage, and manage the community's reputation system. Moderators can see which items have been flagged for review.

EDITIONS

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

To access Community Management:

- "Manage Communities" OR "Create and Set Up Communities"
- AND is a member of the community whose Community Management page they're trying to access

To customize administration settings or use Community Builder:

- "Create and Set Up Communities"
- AND is a member of the community whose Community Management page they're trying to access

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

Important: The options available in Community Management are based on your community template selection, permissions, and preferences. For example, if your community does not use topics, you will not see the Topics node. Some of the options in the following list may not be applicable in your community. To display all nodes, go to **Administration** > **Miscellaneous**and enable **Show all settings in Community Management**.

Overview Page

On the Overview page, you can:

- Edit your community name, description, and URL by clicking next to your community name.
- Manage the status of your community.
- Change your community template if your community needs change.

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 menu doesn't appear, the administrator hasn't mapped any dashboards for this community.

Moderation

View a list of posts, comments, and files that were flagged by community members for review.

Moderation is set up by the administrator. If the Moderation menu doesn't appear, the administrator hasn't enabled members to flag content.

To moderate flagged posts or comments within Community Management, you need "Moderate Communities Feeds". To moderate flagged files, you need "Moderate Communities Files".

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 menu doesn't appear, your community is not using Topics.

Reputation

Set up reputation levels and points to reward members for activity in the community feed.

Reputation is set up by the administrator. If the Reputation menu doesn't appear, the administrator hasn't enabled it.

Administration

On the Administration page, you can update basic setup information 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.
- **Miscellaneous**—Update important settings such as flagging content, nickname display, and public access to Chatter.

Important: If you're an administrator and accidentally remove yourself from a community, you won't be able to access the Administration settings in Community Management. To add yourself back to the community or make other membership updates, use the API.

Advanced Customizations

Perform advanced customizations, such as adding custom pages or pages that don't require login. Use the **Go to Force.com** or **Go to Site.com Studio** links to go to the site associated with your community.

What is a Community Manager?

EDITIONS

Available in:
- Enterprise
- Performance
- Unlimited
- Developer

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

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 the member reaches the top of the level's point threshold, they move up a level.

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

Access the Community Management Page

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

To access the Community Management page, you must be logged in to the community.

1. From within the community, click in the global header.

   Members of the community who have the "Create and Set Up Communities" permission can also access Community Management from the All Communities page in organization setup.

2. Choose the part of the community you want to manage:
   - Update your community name, description, and URL
   - Manage the status of your community
   - Change your community template
   - In **Dashboards** you can view community dashboards and reports
   - In **Moderation** you can monitor and moderate flagged feed items
   - In **Topics** you can manage navigational and featured topics
   - In **Reputation** you can set up reputation levels and points
   - In **Administration** you can customize your community settings, such as members, tabs, branding, login and registration, and emails

   Important: The options available in Community Management are based on your community template selection, permissions, and preferences. For example, if your community does not use topics, you will not see the Topics node. Some of the options in the following list may not be applicable in your community. To display all nodes, go to **Administration** > **Miscellaneous**and enable **Show all settings in Community Management**.

EDITIONS

Available in:
- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

To access Community Management:
- "Manage Communities" OR "Create and Set Up Communities"
- AND is a member of the community whose Community Management page they're trying to access

To customize administration settings or use Community Builder:
- "Create and Set Up Communities"
- AND is a member of the community whose Community Management page they're trying to access

Dashboards

Enable Dashboards for Community Managers

EDITIONS

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

To map dashboards in the Community Management page:

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

  AND

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

Community managers can use dashboards to measure the success of their communities. Dashboards provide information on membership, logins, and activity.

Dashboards selected in the **Dashboards** > **Settings** section of the Community Management page are visible to community managers in the Dashboard section of the Community Management page. You can choose any dashboard you have access to, however, you need to ensure that your community managers have access as well. You can map different dashboards for different communities.

You can also download and install the Salesforce Communities Dashboards package from the AppExchange. This package contains several out-of-the-box reports and dashboards designed for community managers. For more information about the Salesforce Communities Dashboards package, including download and installation instructions, see the *Salesforce Communities Managers Guide*.

If the Salesforce Communities Dashboards package is installed in your organization, each of the dashboard pages has a default mapping to a dashboard from the package. You can overwrite these values as needed.

1. From within the community, click in the global header.

   Members of the community who have the "Create and Set Up Communities" permission can also access Community Management from the All Communities page in organization setup.

2. Click **Dashboards** > **Settings**.
3. For each of the pages, select the dashboard you want to show to community managers.
4. Click **Save**.

Verify the dashboard mappings by clicking **Dashboards** and then clicking each of the page names.

Create a Dashboard to Display on the Community Management Page

You can show any dashboard on the Community Management page, however, we recommend creating them based on custom report types available for communities.

Tip: Keep in mind that you can get pre-configured dashboards in the Salesforce Communities Dashboards package available for download on the AppExchange.

These are the high-level steps to create dashboards to display on the Community Management page.

1. Create custom report types based on the Networks object.

   Reports and dashboards that are based on the Networks object show community-specific information on the Community Management page.

   Note: You can create dashboards based on other objects and expose them on the Community Management page. Just keep in mind that they will show data from across your organization, not just for the community in which you're viewing the dashboard.

   - Select Networks as the primary object.
   - Select a child object:
     - Chatter Messages
     - Groups
     - Network Audits
     - Network Activity Daily Metrics
     - Network Members
     - Network Membership Daily Metrics
     - Network Public Usage Daily Metrics
     - Network Unique Contributor Daily Metrics
     - Topic Assignments
     - Topics

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 to the report will cause the report to only show data for that specific community, regardless of which community you view it in.

3. Create a dashboard with components. Select the report as your source type.
   - Add a component for each report you want to include in your dashboard.
   - Find your report on the Data Sources tab and add it to the component.

4. On the Community Management page, click **Dashboards** > **Settings** to map your dashboard.

When a community manager accesses the Community Management page, the dashboard will appear under **Dashboards**.

Dashboards on the Community Management page are automatically refreshed every day. 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 has not been refreshed for 24 hours, it's refreshed automatically when you access it from the Community Management page. External users with super user access can refresh dashboards set up with "Run as specified user" and "Run as logged-in user" up to 100 times daily per organization. Scheduled and automatic refreshes don't count against the limit. There is no refresh limit for internal users.

EDITIONS

Available in:
- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

To create custom report types:
- "Manage Custom Report Types"

To create, edit, and delete reports:
- "Create and Customize Reports"

To create dashboards:
- "Run Reports" AND "Manage Dashboards"

Communities Reporting

Monitor the health of your community using reports and dashboards.

Tip: You can get pre-configured dashboards in the Salesforce Communities DashboardsSalesforce Communities package available for download on the AppExchange. For detailed download and installation information, see the *Salesforce Communities Managers Guide*.

To monitor the health of your community, you can create custom report types and then create a report using that custom report type. Additionally, if you want your community managers to see your report on the Community Management page, you can create or edit a dashboard to include your report and then map the updated dashboard in Community Management by clicking, **Dashboards** > **Settings**.

Tip: Reports and dashboards that are based on the Networks object show community-specific information on the Community Management page. This means you can create one custom report and use it across all your communities.

USER PERMISSIONS

To run reports:
- "Run Reports"

To schedule reports:
- "Schedule Reports"

To create, edit, and delete reports:
- "Create and Customize Reports"

  AND

  "Report Builder"

Use the following table to get started with reporting for communities:

High-level usage	Primary Object > B (Child Object) > C (Child Object, If Applicable)	Description
Chatter Usage	Networks > Chatter Messages	Create reports on the private message activity in your community.[1]
Chatter Usage	Networks > Groups	Create reports on the groups 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 the login activity in your community.
Moderation	Networks > Network Members > Network Activity Audit — User	Create reports on the users in your community whose items were flagged.
Moderation	Networks > Network Members > Network Activity Audit — Moderators	Create reports on users in your community who either flagged items or moderated a flagged item.
Moderation	Networks > Network Audits	Create reports on all moderation activity in your community.
Public Activity	Networks > Network Public Usage Daily Metrics	Create reports on the daily public community page views and unique visitors.
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 Membership Daily Metrics	Create reports on the daily count of total active members, new members added, and external member logins by member type.

High-level usage	Primary Object > B (Child Object) > C (Child Object, If Applicable)	Description
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.

[1]To report on Chatter Messages, you must have the "Manage All Data" or "Manage Communities" permissions.

Note: You can create dashboards based on other objects and expose them on the Community Management page. Just keep in mind that they will show data from across your organization, not just for the community in which you're viewing the dashboard.

Reputation

Reputation Overview

EDITIONS

Available in:
- Enterprise
- Performance
- Unlimited
- Developer

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.

Your administrator defines the activities that help you gain points. They also set the number of points for each action.

These are the default actions that increase your reputation level:

You increase your reputation by:

- 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

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, because 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. Access Community Management in either of the following ways:
   - From the community, click in the global header.
   - From Setup, click **Customize** > **Communities** > **All Communities**, then click **Manage** next to the community name.
2. Click **Administration** > **Miscellaneous**.
3. Select **Enable setup and display of reputation levels**, then click **Save**.

EDITIONS

Available in:
- Enterprise
- Performance
- Unlimited
- Developer

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.

After you enabled reputation, a default point system and set of reputation levels is available on the Community Management page. The default reputation points are as follows:

Action	Points
Community Engagement	
Write a post	1
Write a comment	1
Receive a comment	5
Like something	1
Receive a like	5
Share a post	1
Someone shares your post	5
Mention someone	1 If your post contains more than one @mention, you get a point for each @mention.
Receive a mention	5

Action	Points
Questions and Answers	
Ask a question	1
Answer a question	5
Receive an answer	5
Mark an answer as best	5
Your answer is marked as best	20
Knowledge	
Endorsing someone for knowledge on a topic	5
Being endorsed for knowledge on a topic	20

If your selected community template doesn't have Chatter enabled, the Reputation node won't appear in Community Management. To show the Reputation node, go to **Administration** > **Miscellaneous** and select **Show all settings in Community Management**.

Set Up Reputation Levels

EDITIONS

Available in:
- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

To update reputation levels:
- "Manage Communities"

  AND

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

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. From within the community, click in the global header.

   Members of the community who have the "Create and Set Up Communities" permission can also access Community Management from the All Communities page in organization setup.

2. Click **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.

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.

Set Up Reputation Points

Set up a point system to reward users for participating in the community.

When reputation is enabled for a community, there is a default point system set up. When users perform the actions with assigned point values, their total points increase and they start to move towards the next reputation level.

Note: Only active users accrue points. For example, if an active user likes the post of an inactive user, the active user gets 1 point, but the inactive user does not get points.

The table shows the default events and points.

Action	Points
Community Engagement	
Write a post	1
Write a comment	1
Receive a comment	5
Like something	1
Receive a like	5
Share a post	1
Someone shares your post	5
Mention someone	1 If your post contains more than one @mention, you get a point for each @mention.
Receive a mention	5
Questions and Answers	
Ask a question	1
Answer a question	5
Receive an answer	5
Mark an answer as best	5
Your answer is marked as best	20
Knowledge	
Endorsing someone for knowledge on a topic	5

EDITIONS

Available in:
- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

To update reputation points:
- "Manage Communities"

  AND

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

Action	Points
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. From within the community, click in the global header.

   Members of the community who have the "Create and Set Up Communities" permission can also access Community Management from the All Communities page in organization setup.

2. Click **Reputation** > **Reputation 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.

Topics

Organize Self-Service Communities with Topics

Topics are available in all communities. But when you set up a self-service community with the Napili template, you can use the Community Management page to quickly guide members to key navigational and featured topics.

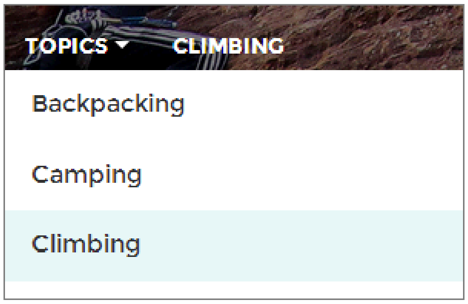
On the Community Management page, you choose navigational topics to provide a consistent map of your community, and featured topics to highlight current, popular conversations. In the community itself, member-created topics let users organize information for each other, creating a personalized experience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

In a self-service community, the Napili template specifies the layout and design of navigational, featured, and member-created topics. Below are visual examples of each type in an active community.

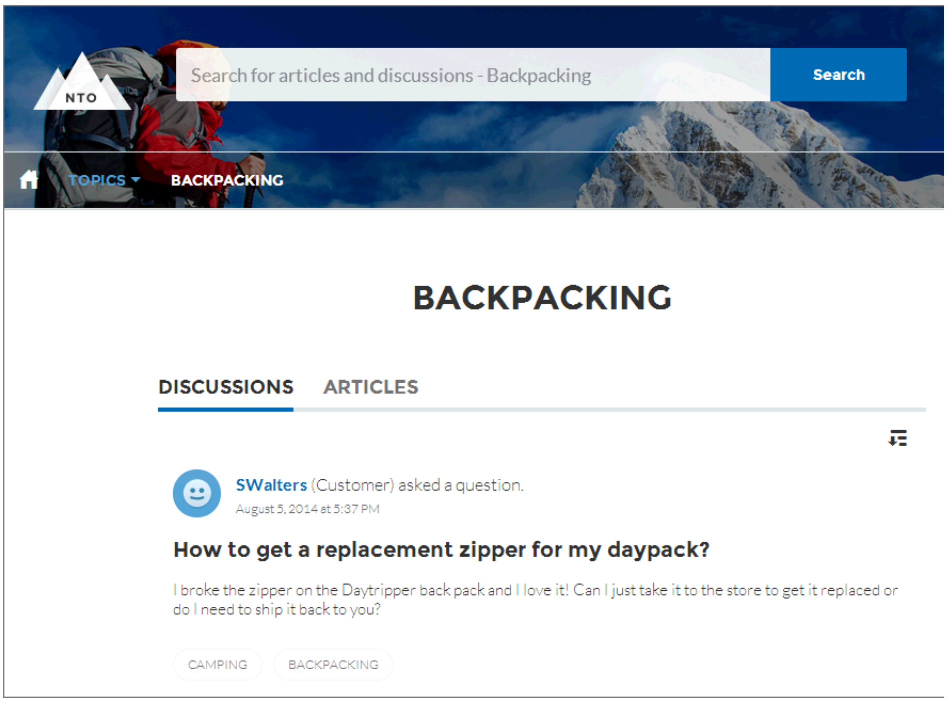
Tip: To add navigational and featured topics to other types of communities, Apex developers can use the ConnectApi.ManagedTopics class in a Visualforce page.

Navigational topics

On every page of a self-service community, navigational topics are available from the Topics menu at upper left.

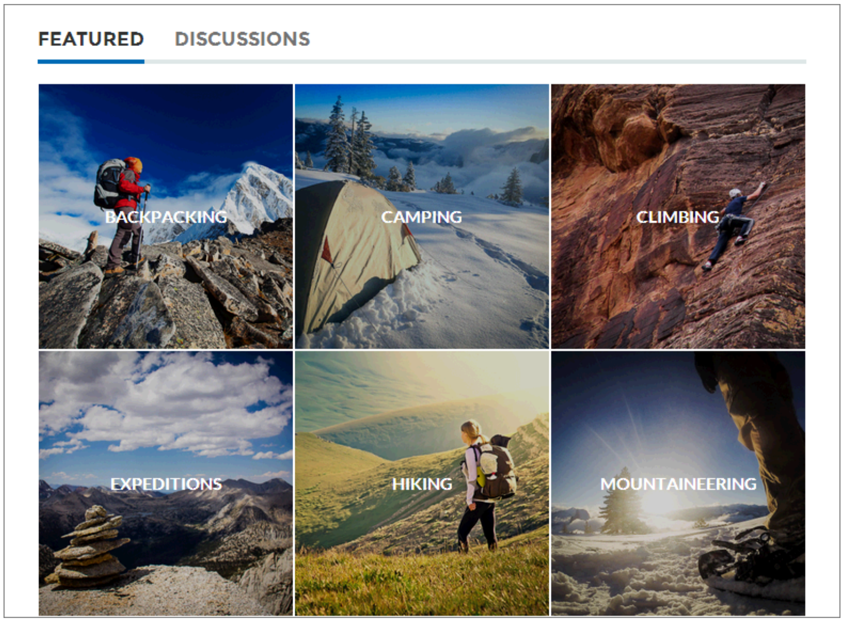


When visitors choose a navigational topic, the banner image you selected for it appears at the top of the page.



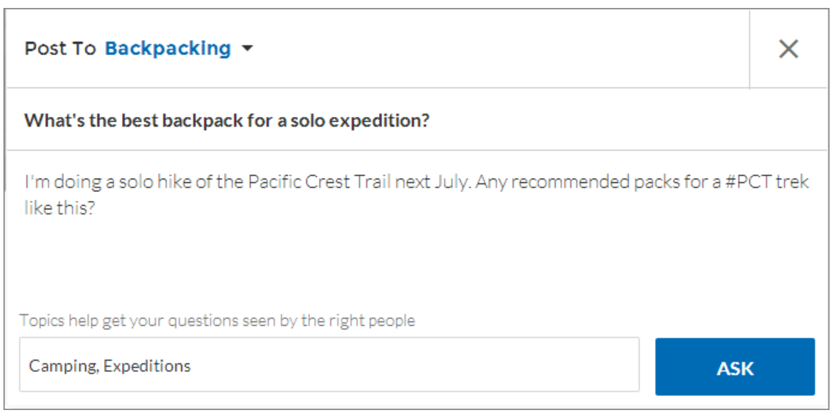
Featured topics

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 below. (In Setup, the "Assign Topics" and "Create Topics" permissions must be enabled for community users.)



If any suggested topics are poor matches for the post, members can simply click to delete them.

Tip: Member-created topics can be accessed via search, or highlighted as featured topics on the Community Management page.

Set Up Navigational Topics

Navigational topics provide consistent entry points to key community areas that people often return to. If your organization uses data categories, community managers add current Salesforce Knowledge articles with those categories to each navigational topic page. (If data categories aren't enabled, administrators add articles to each topic using the Chatter REST API.)

Note: You can create a maximum of 25 navigational topics.

1. From Setup, choose **Build** > **Customize** > **Topics** > **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. From the community, click in the global header.
3. Click **Topics** > **Navigational Topics**.
4. In the text box at right, enter a topic name, and click **Add**.
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 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, and then click **Save**.

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 delete a topic, or change its banner image, click .

EDITIONS

Available in:
- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

To access the Community Management page:
- "Manage Communities"

  OR

  "Create and Set Up Communities"

  AND

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

To set up navigational topics:
- "Create Topics"

  AND

  "Edit Topics"

To add articles to topics:
- "View Data Categories"

  AND

  "Read" on related article types

Set Up Featured Topics

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

Note: You can create a maximum of 25 featured topics.

1. From the community, click in the global header.
2. Click **Topics** > **Featured Topics**.
3. From the pop-up menu at right, select a navigational or member-created topic you want to feature. Then click **Add**.

   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 3-4 to create several featured topics for your community, and 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 rename or delete topics, or change their thumbnail images, click .

EDITIONS

Available in:
- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

To access the Community Management page:
- "Manage Communities"

  OR

  "Create and Set Up Communities"

  AND

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

To set up featured topics:
- "Edit Topics"

Manage Topics in Communities

As the number of topics in a community grows, you may want to streamline them to improve usability. In Community Management, you can create and merge topics in one convenient location.

1. From the community, click in the global header.
2. At left, click **Topics** > **Topic Management**.
3. Review the list of existing topics (clicking **Show More** if necessary). Then do either of the following:
   - To create a topic (often with a plan to merge existing ones into it), click **New**.
   - To combine existing topics, click **Merge**.

     Merging a topic automatically redirects existing hashtags in posts.

   Note: Topic merging is in beta and has known limitations. Assignments for feed items and records are merged, but topic-following and endorsement data isn't. We welcome your feedback on the IdeaExchange.

EDITIONS

Available in:
- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

To access the Community Management page:
- "Manage Communities"

  OR

  "Create and Set Up Communities"

To create or merge topics:
- "Create Topics"

  OR

  "Merge Topics"

Translate Topic Names in Communities (Beta)

Specify unique, language-specific names for navigational and featured topics, customizing the experience for international versions of communities.

Note: Topic translation is in beta and has known limitations. We welcome your feedback on the IdeaExchange.

1. From Setup, click **Translation Workbench** > **Translate**.
2. Select the `Language` you're translating into.
3. For `Setup Component`, select **Managed Topic**.
4. In the `Community Name` column, expand a community to see its master topic names.
5. Double-click in the `Topic Name Translation` column to enter language-specific names for navigational and featured topics. (Only those topic names are translated.)

EDITIONS

Available in:
- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

To translate terms:
- "View Setup and Configuration"

  AND

  Be designated as a translator

Moderation

Communities Moderation Overview

Community moderation allows you to empower members of your community to monitor content and ensure that it is appropriate and relevant.

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 all members to flag posts, comments, or files that are inappropriate
- Allow moderators to review flagged items and take action, such as deleting a post, comment, or file
- Allow group owners and managers to moderate within their groups
- Create triggers to automatically flag inappropriate items behind the scenes
- Create custom reports to track flagging and moderation activity within your communities

If you don't want users manually flagging items, but do want to take advantage of moderation capabilities for your communities, you can set up triggers to automatically flag certain items. For instance, you could set up a trigger to silently flag posts with certain inappropriate words. You can either query the flagged items using the API or create custom reports to track flagging and moderation activity in your communities. To use a custom report, you must create a custom report type using Networks as the primary object and Network Audits as the secondary object. Moderators can continue to flag items even if flagging is disabled for community members.

EDITIONS

Available in:
- Enterprise
- Performance
- Unlimited
- Developer

Assign a Community Moderator

Assign one or more people as moderators in your community. Moderators must be employees from your company.

You can assign moderators by creating a permission set that includes one or both of the moderation permissions. To access the Flagged Posts on the Community Management page, a moderator also needs the "Manage Communities" permission.

Permission	Description
Moderate Communities Feeds	Review flagged posts and comments and take action, such as removing flags or deleting the post or comment. Sees a Flagged filter and list view that they can use to manage flagged items they have access to.
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.
Manage Communities	Access the Community Management page, where the Flagged Posts feed is displayed.

EDITIONS

Available in:
- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

To assign permission sets:
- "Assign Permission Sets"

You can also add these permissions to a profile. These permissions are valid for all communities the user is a member of, but don't apply in your internal organization.

1. From Setup, click **Manage Users** > **Permission Sets**, then click **New**.
2. Create a permission set that includes the appropriate permissions.
3. From Setup, click **Manage Users** > **Users**.
4. Find the user you want to be a community moderator and add the permission set to their Permission Set Assignments related list.

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

When `Allow members to flag content` is enabled for a community, group owners and managers can moderate posts, comments, and files in groups that they own or manage. This includes the following abilities:

- Viewing flags and flag counts
- Removing all flags
- Deleting posts, comments, or files

Enabling Users to Flag Items in Your Community

Turn on flagging for your community to empower members to flag posts and comments 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.

1. Access Community Management in either of the following ways:
   - From the community, click in the global header.
   - From Setup, click **Customize** > **Communities** > **All Communities**, then click **Manage** next to the community name.
2. Click **Administration** > **Miscellaneous**, 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
- Group owners and managers can moderate groups they own or manage

If you don't want users manually flagging items, but do want to take advantage of moderation capabilities for your communities, you can set up triggers to automatically flag certain items. For instance, you could set up a trigger to silently flag posts with certain inappropriate words. You can either query the flagged items using the API or create custom reports to track flagging and moderation activity in your communities. To use a custom report, you must create a custom report type using Networks as the primary object and Network Audits as the secondary object. Moderators can continue to flag items even if flagging is disabled for community members.

EDITIONS

Available in:
- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

To enable users in your community to flag items:
- "Create and Set Up Communities"

  AND

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

Setting Up Triggers for Flagging Items

USER PERMISSIONS

To create triggers:
- "Modify All Data"

Use triggers to automatically flag items in your community that meet certain criteria.

Using triggers to automatically flag items allows you to moderate your community behind the scenes. Flags are only visible to moderators. You can view flags on the Flagged Posts feed on the Community Management page, 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, or ContentDocument.
- Define criteria that when met, creates a NetworkModeration (flag) record, with the FeedComment, FeedItem, or ContentDocument as the parent.

Example: Here are some sample triggers.

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

```
trigger autoflagBadWord on FeedItem (after insert) {
    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');
            insert(nm);
        }
    }
}
```

A similar trigger on comments would look like this.

```
trigger autoflagBadWord on FeedComment (after insert) {
    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');
            insert(nm);
        }
    }
}
```

DESIGN YOUR COMMUNITY'S LOOK AND FEEL

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:

- Using Visualforce and Force.com Sites
- Using Community Builder With Templates
- Using Community Builder (Site.com) Without Templates

You can also customize these other areas of your community:

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

Customizing Community Pages

Choosing Between Community Builder (Site.com) and Force.com Sites

If you want to add new pages or customize existing pages in your community, you can use Force.com Sites or Community Builder (previously Site.com). With either option, you can create branded, publicly available pages such as landing or marketing pages, and private custom pages that only community members can access.

So which option should you use to customize your community? Well, that depends on your skills and the needs of your organization. You can even use a mixture of Force.com pages and Community Builder pages for complete control over your customizations.

Community Builder (Site.com)

Community Builder is an intuitive, convenient tool for customizing your community. Community Builder lets you create a community based on a preconfigured template, and then apply branding, edit pages, update your template, and publish changes all from one user-friendly interface.

If you're not using a preconfigured template, you can take advantage of Site.com Studio within Community Builder. Aimed at less technical users, Site.com Studio is a Web content management system (CMS) that provides a drag-and-drop environment to customize your community's pages. Site.com Studio makes it easy to build dynamic, data-driven Web pages quickly and edit your content in real time. There's no code required (although you can add custom code if you need to) but familiarity with CSS and HTML helps.

- Use one of the self-service templates—Koa, Kokua, or Napili—to easily create a responsive self-service community.
- Use the Aloha template to easily create a configurable App Launcher.
- Design pixel-perfect, branded pages.
- Create public pages that anyone can access, or add private pages that you can add as a tab within your community.
- Build and iterate quickly using 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.

Force.com Sites

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

- Create public, branded pages that anyone can access.
- Leverage Visualforce to create private pages that you can add as a tab within your community.
- Write your own controllers, or extensions to controllers, using Apex code.
- Create custom login or self-registration pages.
- Build dynamic web applications, such as an event management application.

Features At a Glance

Still unsure which product to choose? Take a look at this table to learn more about each product's features.

Feature	Community Builder (Site.com)	Force.com Sites
Public pages	✓	✓
Community templates (Koa, Kokua, Napili, Aloha)*	✓	
Authenticated pages*	✓	
Visualforce pages		✓
Out-of-the-box login, logout, self-registration, and error pages	✓	✓
Drag-and-drop environment	✓	
Reusable page elements	✓	
Pixel-perfect designs	✓	✓
IP restrictions	✓	✓
Access to data, such as cases, leads, and opportunities	✓	✓
Ready-made forms	✓	
CMS	✓	
Programmatic page creation (using Apex, APIs, and controllers)		✓
Web applications		✓
Analytics, reports, and workflows		✓
Full Force.com platform capability		✓

*Available in Community Builder (Site.com) for Communities users only.

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

- "Site.com Overview" in the Salesforce Help
- "Force.com Sites Overview" in the Salesforce Help

Using 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.

Can I use the same domain name for my Force.com Sites and my Communities?

No, you can't use the same domain name.

Force.com Sites and Communities must each use a unique domain name. If you're using a domain name for your Force.com site and you want to use it for your communities instead, contact Salesforce Support for assistance with renaming the domain.

Using Community Builder With Templates

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

With Community Builder and templates you can:

- Use a predefined template to create a community that provides a smooth and responsive user experience on any mobile device. You can even add a custom login page.
- Quickly style the community to match your company's branding.
- Edit Pages with Community Builder to customize their design and content.
- Preview your community to ensure that it appears correctly on different devices.
- Publish your changes to make them available to everyone in your community.
- Apply template updates to your community as soon as they become available.

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

Kokua
: A visually rich, responsive self-service template that lets users search for and view articles or contact support if they can't find what they're looking for. Supports Knowledge and Cases.

Koa
: A text-based, responsive self-service template that lets users search for and view articles or contact support if they can't find what they're looking for. Supports Knowledge and Cases.

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

Aloha
: A configurable App Launcher template that lets users quickly find applications and access them using single sign-on authentication. For more information, see Getting Started with Community Templates for Salesforce Identity.

To access Community Builder and continue customizing your community or update its template version:

1. From Setup, click **Customize** > **Communities** > **All Communities**.
2. Next to the community name, click **Manage**.
3. On the Community Management page, under the template name, click **Customize Template**.

   You are taken to the Community Builder.

4. In Community Builder, you can:
   - Brand your community.
   - Edit community pages.
   - Update your community template.

Note: Community Builder doesn't support branding for sites that weren't created using one of the preconfigured templates. Instead, you must use Site.com Studio To get there, click Site.com Studio from the Communities menu in the toolbar.

To learn more about using the Kokua, Koa, and Napili templates, see the *Community Templates for Self-Service Implementation Guide*.

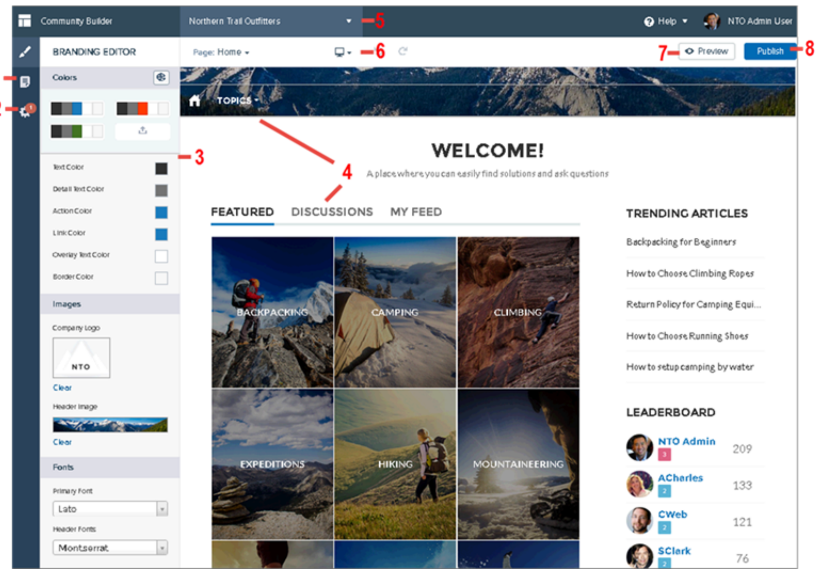
Navigate Community Builder

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

From Community Management, click `Customize Template` to use Community Builder to brand and configure your community.

Note: Remember, Community Builder doesn't support branding for communities that weren't created by using one of the preconfigured templates. Instead, you must use Site.com Studio.

In Community Builder, you can customize the community to suit your needs.



- Edit the properties (1) of your community pages in the Page Editor.
- Accept updates (2) to your community's template.
- Brand the community (3) to match your organization's style and see your changes immediately appear on the page.
- Navigate (4) to the community page that you want to style by clicking links and menu items.
- Use the Communities menu (5) to:
  - Go to Site.com Studio to add advanced community customizations.
  - Access Community Management to manage community analytics, login, registration, reputation, topics, and other settings.
- See how your community appears on different devices (6).
- Preview the community (7) in a new browser window.
- Publish your changes (8) to make your updates available to everyone in your community.

EDITIONS

Available in:
- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

To create, customize, or publish a community:
- "Create and Manage Communities"

  OR

  `Site.com Publisher User` field enabled on the user detail page

  AND

  Site administrator or designer role assigned at the site level

Brand Your Community with Community Builder

Use Community Builder's Branding Editor and Page Editor to efficiently style a community that's based on a preconfigured template.

EDITIONS

Available in:
- Enterprise
- Performance
- Unlimited
- Developer

Note: Community Builder is not available for communities created with the Salesforce Tabs + Visualforce template.

After creating a community based on a template, here's what you can do to customize it:

- Apply a color scheme that's appropriate for your template with the color palette.
- Choose colors for text, borders, and button backgrounds.
- Upload your own company logo image to generate a custom color palette based on its main colors.
- Maintain your own color palettes by saving or removing them as needed.
- Specify font family, style, and weight.
- Change header and page background color, font family, font size, and font color.

Note: The available branding options vary depending on the template that you're using and the page that you've selected.

1. Navigate to the pages that you want to view as you brand by using the Page menu in the toolbar.
2. Define styles, such as:
   - The range of colors that are used by the entire site, by selecting a palette swatch.
   - A specific color, by using the relevant color picker or entering a hex value.
   - An image, by clicking the image area and uploading an image.
   - The font type, size, or weight, by selecting an option in the relevant drop-down list.

   Your changes are saved automatically and appear instantly on the page canvas.

To learn more about styling and publishing your community, see *Community Templates for Self-Service Implementation Guide*

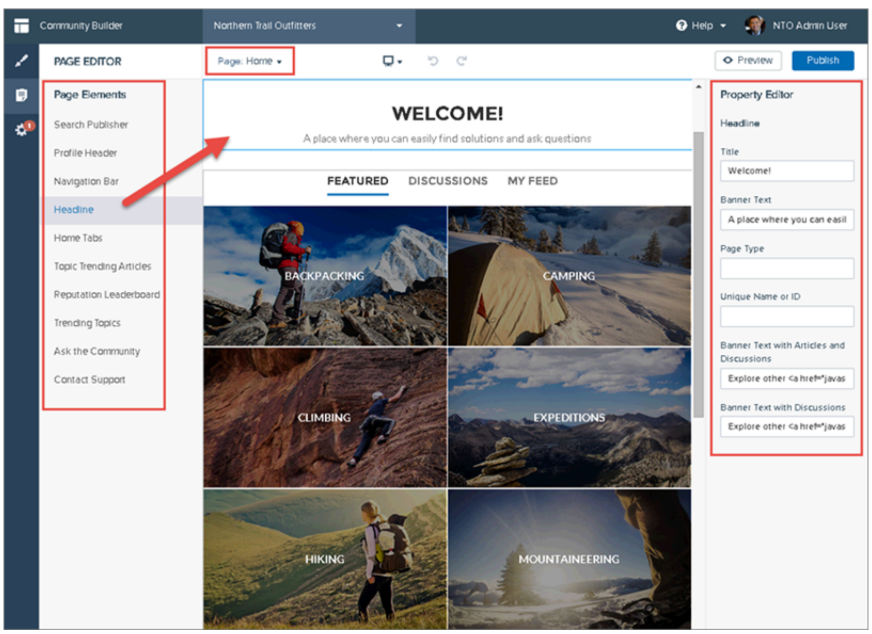
Edit Pages with Community Builder

Use Community Builder's Page Editor to customize your community's pages without needing to use Site.com Studio. Select and edit any of your page elements, and then preview your changes before publishing them from Community Builder.

After you've created a community, edit page element properties like text labels, search parameters, and display options within Community Builder. Each template is comprised of different sub-pages that have customizable elements. For example, the Headline page element on the Home page lets you change text for the banner that displays on that page.

1. From Community Management, click **Customize Template**.
2. In Community Builder click the Pages icon to display the Page Editor.
3. From the Page menu in the toolbar, select the page to edit.
4. Select a page element from the list at the left or click the page element on the main canvas. The Property Editor shows the editable properties of the element you selected.
5. Make your changes. Changes are saved automatically in draft mode, but aren't live until you publish the community.

Example: Page Editor with Headline element selected on the Home page



EDITIONS

Available in:
- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

To create, customize, or publish a community:
- "Create and Manage Communities"

  OR

  `Site.com Publisher User` field enabled on the user detail page

  AND

  Site administrator or designer role assigned at the site level

Update Your Community's Template

EDITIONS

Available in:
- Enterprise
- Performance
- Unlimited
- Developer

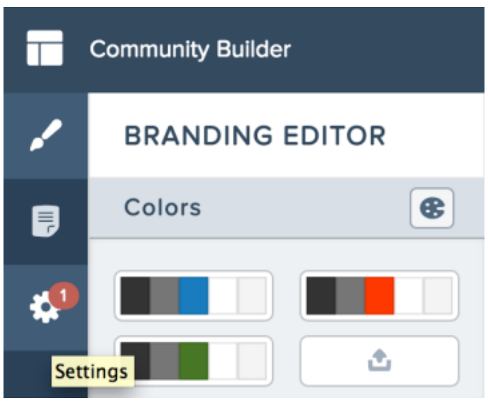
USER PERMISSIONS

To update your template
- "Create and Manage Communities"

Use Community Builder to learn about and apply a new version of your community's template. Updating your template keeps your current branding, while saving a copy of your community with the old template version applied. You get the latest styling and functionality, with the option to revert to your previous template version.

If you are using any of the community templates provided by Salesforce, you can get template updates from within Community Builder as they become available, and apply them to your community whenever you want.

When a template update is available, you'll see a red notification icon over the Settings icon in Community Builder. You don't have to apply an update when it becomes available; you can wait until you're ready.



For the Koa and Kokua self-service templates, general settings (such as Category Group Name, Top Level Category, and Company Name) are carried over in addition to branding. For Napili, topic definitions are carried over. Otherwise, only branding information is carried over. In all cases, other customizations (such as changes to page element properties) are *not* automatically carried over.

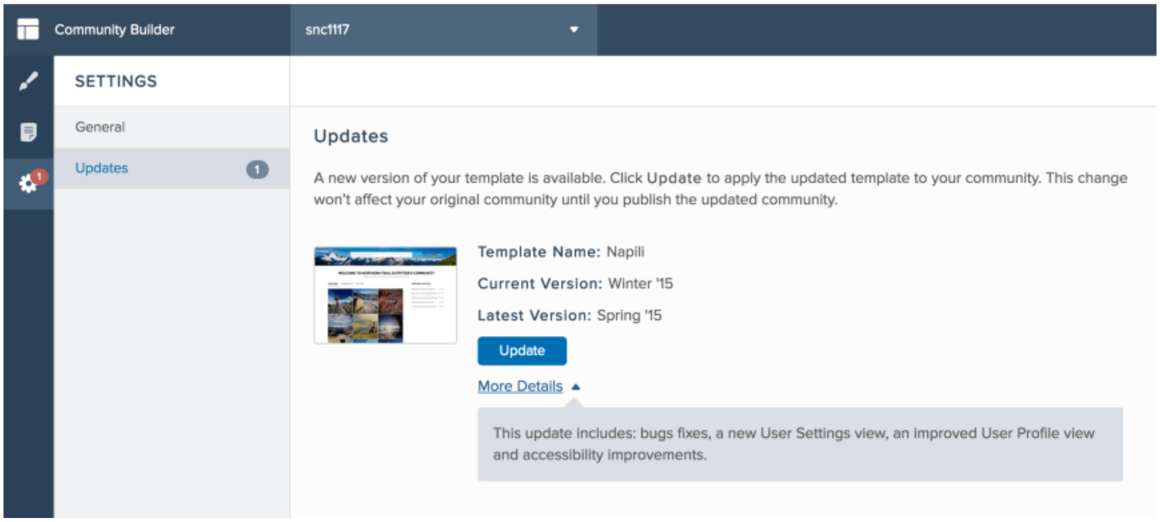
Note: If you are using Salesforce Tabs + Visualforce, template updates do not apply.

Updating your community's template automatically preserves your community's existing home page URL. You don't need to do anything to configure the home page. Users are directed to the new home page automatically and transparently when they access the community.

When you update, the old version of your community is saved with a unique home page URL. If you need to restore your community to the previous template version, manually set the home page to the new URL that was generated for the original community, in Site.com Studio under Site Configuration.

When an update to your community's template becomes available, here's how to get it.

1. From Community Management, click `Customize Template` to open Community Builder.
2. Click the red notification icon that appears over the Settings icon.
3. Under Settings, click `Updates`.



4. Click `Update` to update your template to the new version, and then confirm the update when prompted.
5. Look at all of your pages to make sure that your branding and styles are as you expect.
6. Publish your community to apply the template updates.

Change Your Community Template

Change your community template if the requirements of your community evolve from when you first set it up.

Tip: You won't lose any data when you change templates, but make sure to review Considerations When Changing Your Community Template before performing the steps below.

If your community is already active and you change templates from a Salesforce Tabs + Visualforce template to a Community Builder-based template, or from a Community Builder-based template to another Community Builder-based template, your template change is saved in a draft version that you can further customize in Community Builder. You must publish your changes in Community Builder before your active community is updated.

If your community is already active and you change templates from a Community Builder-based template to a Salesforce Tabs + Visualforce template, your active community is updated immediately. In this scenario, we recommend that you first deactivate your community. Once you have made all of your changes, you can then re-activate it.

If your template is listed as `None`, this means you're not using a predefined Community Builder-based template or you have modified a Community Builder-based template.

If you are using a Community Builder-based template and you customize your template, the Overview page shows the name of template you have in draft mode in Community Builder. A warning message reminds you to publish your changes in Community Builder.

1. Access Community Management in either of the following ways:
   - From the community, click in the global header.
   - From Setup, click **Customize** > **Communities** > **All Communities**, then click **Manage** next to the community name.
2. On the Overview page next to your currently selected **Template**, click to change your template selection.

EDITIONS

Available in:
- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

To create, customize, or activate a community:
- "Create and Set Up Communities"

  AND

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

3. Choose a template that meets your community's needs.

   To learn more about using the Kokua, Koa, and Napili templates, see the *Community Templates for Self-Service Implementation Guide*.

   To learn more about using the Aloha template, see the *Identity Implementation Guide*.

4. When prompted, select **Change Template** to confirm your changes.

After you change the template, you are taken back to Community Management. If required, customize your community in Community Builder. Make sure to publish any changes you make.

Considerations When Changing Your Community Template

EDITIONS

Available in:
- Enterprise
- Performance
- Unlimited
- Developer

Review the following considerations before changing your community template in Community Management.

To learn more about using the Kokua, Koa, and Napili templates, see the *Community Templates for Self-Service Implementation Guide*.

To learn more about using the Aloha template, see the *Identity Implementation Guide*.

- Switching between templates updates the navigation in Community Management. To view all available options in Community Management, regardless of template selection, select **Administration** > **Miscellaneous** > **Show all settings in Community Management**.
- Your community URL changes when switching from a Salesforce Tabs + Visualforce template to a Community Builder template, or vice versa. For example, in Community Builder-based templates `/s` is appended to your URL. Be sure to update any links to your community with the new URL.

Using 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" in the Salesforce Help.

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 page elements, 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 only if `Use Site.com to create custom community pages` is selected in the Tabs & Pages section of your community's administration settings. Otherwise, the Site.com Community site uses the URLs that you've specified directly in the Tabs & Pages section. Community error pages are specified in Force.com Setup, under **Pages**.
- When your Site.com Community site is inactive, users are redirected to the Page Not Found page defined in Force.com Setup, 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`

Using Site.com to Customize Your Community

EDITIONS

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

Available (with limitations) in: **Developer** Edition

USER PERMISSIONS

To build, edit, and manage a community's custom pages:

- "Create and Set Up Communities"

  OR

  `Site.com Publisher User` field enabled on the user detail page

  AND

  Site administrator or designer role assigned at the site level

Communities users can use Site.com to build custom, branded pages for a community. There are many approaches to building custom pages for your community, but these are some of the typical stages involved:

- **Import Assets**—Collect the assets, images, and files you plan to use on your custom page. Import the assets into Site.com Studio, where they appear in the Assets section of the Overview tab.
- **Create Branded Pages**—The quickest and easiest way to create branded pages is to use the Community Template, which is automatically included with all Site.com community sites. When you create a new page based on the Community Template, the page includes all of the branded styles in your community, including the community's header and footer. If you want even more control over the look and feel of your community page, you can create your own page template, drag community headers and footers to it from the Widgets section of the Page Elements pane, and add other community styles.

  Note: As of Spring '15, the Community Template is no longer available for new communities. If you already have a Site.com community that's based on the Community Template, it will continue to work. For information on creating a community, see Creating Communities on page 10.

- **Use Branded CommunityStyles**—Develop the look and feel of your custom pages by using the CommunityBranding style sheet, or by creating branded community styles in your own cascading style sheets (CSS). If you're not completely up to speed with CSS, the Style pane provides an easy, visual way to create and manage styles. Or if you're a CSS expert who likes to get straight into the code, you can hand-code community styles right in your own style sheets.
- **Create Public Pages**—Using the template as a base, you can quickly create pages, which automatically inherit all the elements of the page template. Or if you need a standalone page that doesn't follow the overall design, you can create a blank page instead.
- **Make Pages Private**—By default, any page you create in Site.com Studio is publicly available. However, you can make pages private so that only logged-in Communities users can access them.
- **Add Features, Page Elements, and Community Widgets**—Use Site.com's prebuilt page elements to add features such as navigation menus, images, content blocks, and community widgets. Retrieve data from your organization's objects and dynamically display it on your site pages using data repeaters and data tables. Alternatively, gather and submit data from visitors using forms.

- **Add and Edit Content**—At this stage, the page is usually ready for you to add and edit content such as text, images, videos, and hyperlinks. And as you work, you can upload any images or files you need.
- **Review and Test the Page**—Testing the changes to your page happens throughout the development cycle. You should always preview your changes to ensure they display as expected in a browser. You can also send a preview link to reviewers so they can review the finished product before it goes live.
- **Publish the Page**—After testing is complete, you're ready to make the page available to your community by publishing your changes.
- **Add Authenticated Pages to Your Community's Tab**—Now that the page is tested and published, if you're working with authenticated pages, the final step is to add the page to a tab in your community.
- **Use Site.com in Sandbox**—Site.com is now available on sandbox. When you create a sandbox copy from a production organization, you can include your Site.com sites. You can also copy your sandbox site back to production using the overwrite feature.

Creating Branded Pages in Site.com

Creating Branded Pages Overview

When you create a Community site, Salesforce automatically creates a new Site.com site and associates it with your community.

With Site.com Community sites you can:

- Use the branded Community template to create Site.com pages for your community.

  Note: As of Spring '15, the Community Template is no longer available for new communities. If you already have a Site.com community that's based on the Community Template, it will continue to work. For information on creating a community, see Creating Communities on page 10.

- Use the `CommunityBranding` style sheet to style Site.com pages by using CSS.
- Create your own community CSS styles using a number of available `Network` namespace expressions.

EDITIONS

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

Available (with limitations) in: **Developer** Edition

Creating Branded Pages from the Community Template

Site.com Community sites include a branded template that you can use to create new community site pages.

The styles for the `Community Template` come from the `CommunityBranding` style sheet, which is automatically included for all new Site.com Community sites.

To create branded pages from the `Community Template`:

1. On the Site.com Overview tab, hover over Site Pages and click **New**.
2. Type the new community page name. Page names can't include spaces or special characters, such as #, ?, or @.
3. Make sure `Community Template` is selected for the page template.
4. Click **Create**.

Note:

- Community branding options, such as headers, footers, and page colors, are set from the **Administration** > **Branding** section on the Community Management page.
- Empty community headers and footers, or headers that contain only images, won't work in Site.com. Be sure to specify customized HTML blocks for your community headers and footers if you're creating Site.com pages from the `Community Template`, or creating community headers and footers using `Network` namespace expressions.
- Community headers and footers are available as widgets in Site.com community pages. To add a community header or footer to a blank page, drag it to the page from the Widgets section of the Page Elements pane.

EDITIONS

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

Available (with limitations) in: **Developer** Edition

USER PERMISSIONS

To build, edit, and manage a community's custom pages:

- "Create and Set Up Communities"

  OR

  `Site.com Publisher User` field enabled on the user detail page

  AND

  Site administrator or designer role assigned at the site level

Applying Community Styles from the CommunityBranding Style Sheet

The `CommunityBranding` style sheet contains a set of CSS styles created from `Network` namespace expressions.

The `CommunityBranding` style sheet is attached to the `Community Template`, and is responsible for the template's branded look and feel. You can access the styles in the `CommunityBranding` style sheet and apply them directly to elements on any page.

To apply community styles using the `CommunityBranding` style sheet:

1. Make sure the `CommunityBranding` style sheet is attached to the Site.com page you want to brand. (See "Creating and Using CSS Style Sheets" in the Salesforce Help.)

   Note: All Site.com pages based on the `Community Template` automatically have the `CommunityBranding` style sheet attached to them.

2. Select the element on the page you want to style.
3. Open the Style pane.
4. Select Class.
5. Start typing "brand".
   A list of all of the available styles in the `CommunityBranding` styles sheet appears.
6. Select the style you want to apply.

EDITIONS

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

Available (with limitations) in: **Developer** Edition

USER PERMISSIONS

To build, edit, and manage a community's custom pages:

- "Create and Set Up Communities"

  OR

  `Site.com Publisher User` field enabled on the user detail page

  AND

  Site administrator or designer role assigned at the site level

Creating Community Styles in a CSS Style Sheet

Branded Community styles are available in Site.com Community sites through `Network` namespace expressions.

You can access a full list of available `Network` namespace expressions to create new community styles in any CSS style sheet. When you add an expression to a CSS rule, Site.com "pulls in" the style as it's defined in the community, and displays it on your page.

To create community styles in a CSS style sheet:

1. Open an existing style sheet or create a new style sheet. (See "Creating and Using CSS Style Sheets" in the Salesforce Help.)
2. Click **Edit Style Sheet Code**.
3. Add a new community style rule by using any of the available `Network` expressions. You can create both ID styles and class styles. For example:

EDITIONS

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

Available (with limitations) in: **Developer** Edition

USER PERMISSIONS

To build, edit, and manage a community's custom pages:

- "Create and Set Up Communities"

  OR

  `Site.com Publisher User` field enabled on the user detail page

  AND

  Site administrator or designer role assigned at the site level

```
#main_content_block {
  background-color: {!Network.primaryColor};
  color: {!Network.primaryComplementColor};
}
.secondary_content_blocks{
  background-color: {!Network.zeronaryColor};
  color: {!Network.zeronaryComplementColor};
}
```

4. Apply the new styles to elements on other pages.

Note: Remember, the style sheet that contains your community styles must be attached to the page containing your styled elements.

Expressions Available for Community Branding

You can use the `Network` namespace expressions listed on this page to create your own Community styles.

Community branding options, such as headers, footers, and page colors, are set from the **Administration** > **Branding** section on the Community Management page.

EDITIONS

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

Available (with limitations) in: **Developer** Edition

Note:

- Empty community headers and footers, or headers that contain only images, won't work in Site.com. Be sure to specify customized HTML blocks for your community headers and footers if you're creating Site.com pages from the `Community Template`, or creating community headers and footers using `Network` namespace expressions.
- Community headers and footers are available as widgets in Site.com community pages. To add a community header or footer to a blank page, drag it to the page from the Widgets section of the Page Elements pane.

Network Expression	Corresponding Community Branding Page Element
`{!Network.header}`	Custom content of the community header.
`{!Network.footer}`	Custom content of the community footer.
`{!Network.zeronaryColor}`	The background color for the community header.
`{!Network.zeronaryComplementColor}`	The font color used with `zeronaryColor`.
`{!Network.primaryColor}`	The color used for active tabs in the community.
`{!Network.primaryComplementColor}`	The font color used with `primaryColor`.
`{!Network.secondaryColor}`	The color used for the top border of lists and tables in the community.
`{!Network.tertiaryColor}`	The background color for section headers on edit and detail pages in the community.
`{!Network.tertiaryComplementColor}`	The font color used with `tertiaryColor`.
`{!Network.quaternaryColor}`	The background color for pages in the community.
`{!Network.quaternaryComplementColor}`	The font color used with `quaternaryColor`.

Viewing the CommunityBranding Style Sheet

The `CommunityBranding` style sheet contains a set of branded styles from your community.

Community branding options, such as headers, footers, and page colors, are set from the **Administration** > **Branding** section on the Community Management page.

To see the Community styles in the `CommunityBranding` style sheet, on the Site.com Overview tab, click Style Sheets, and click the `CommunityBranding` style sheet. The Community styles are listed on the left. To see the code for the style sheet, click **Edit Style Sheet Code**.

EDITIONS

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

Available (with limitations) in: **Developer** Edition

A total of fourteen Community class styles are provided. These are the default contents of the style sheet:

```
.brandZeronaryBgr {
 background-color: {!Network.zeronaryColor} !important;
}
.brandZeronaryFgr {
 color: {!Network.zeronaryComplementColor} !important;
}
.brandPrimaryBgr {
 background-color: {!Network.primaryColor} !important;
}
.brandPrimaryFgr {
 color: {!Network.primaryComplementColor} !important;
}
.brandPrimaryBrd2 {
 border-color: {!Network.primaryComplementColor} !important;
}
.brandPrimaryFgrBrdTop {
 border-top-color: {!Network.primaryComplementColor} !important;
}
.brandPrimaryBrd {
 border-top-color: {!Network.primaryColor} !important;
}
.brandSecondaryBrd {
 border-color: {!Network.secondaryColor} !important;
}
.brandSecondaryBgr {
 background-color: {!Network.secondaryColor} !important;
}
.brandTertiaryFgr {
 color: {!Network.tertiaryComplementColor} !important;
}
.brandTertiaryBgr {
 background-color: {!Network.tertiaryColor} !important;
 color: {!Network.tertiaryComplementColor} !important;
 background-image: none !important;
}
.brandTertiaryBrd {
 border-top-color: {!Network.tertiaryColor} !important;
}
.brandQuaternaryFgr {
 color: {!Network.quaternaryComplementColor} !important;
}
.brandQuaternaryBgr {
 background-color: {!Network.quaternaryColor} !important;
}
```

Adding Authenticated Pages in Site.com

Site.com Authorization Overview

EDITIONS

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

As part of your site design, you might want to control what content is public and private to your site visitors. New sites are initially set so that all site resources, such as folders and pages, are public. You can change the default setting from the Authorization view found under Site Configuration.

The global site authorization options are:

- No Authorization (default)—All resources are public.
- Requires Authorization—All resources are private.
- Custom—All resources are public by default, but can be made private.

The No Authorization and Requires Authorization options let you quickly make your site either all public or all private. But, if you want to control access to individual pages, folders, and other resources, use the Custom option. Selecting Custom enables a `Requires Authorization` checkbox on the Actions menu for all resources throughout the site. You can define authorization at the site, folder, page, and individual resource level. As you mark items for authorization, a lock icon appears on them. After a resource, like a page, is marked as private, users who aren't logged into Salesforce are asked to log in when they try to access it.

Resources can inherit their privacy setting from folders. For example, when a resource, such as a site folder, is marked for authorization, anything placed in that folder inherits the folder's authorization setting and becomes private. If you drag that resource into a public folder, it becomes public again. But, if you explicitly mark a resource as private using the Actions menu, and then drag it into a public folder, it still remains private because the privacy setting at the resource level dominates.

When you use the Custom option, an authorization table appears in the Authorization view that lets you manage your private resources/items marked as private. You can remove authorization from a resource by either deleting it from the authorization table, or by deselecting the Requires Authorization box on the item itself.

Setting Authorization on Your Site

As part of your site design, you might want to control what content is public and private to your site visitors. New sites are initially set so that all site resources, such as folders and pages, are public. You can change the default setting from the Authorization view found under Site Configuration.

The global site authorization options are:

- No Authorization (default)—All resources are public.
- Requires Authorization—All resources are private.
- Custom—All resources are public by default, but can be made private.

1. Open your site for editing.
2. Click **Site Configuration** > **Authorization**.
3. Select an authorization option.

EDITIONS

Available in:
- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

To manage authorization:
- You must be an administrative user on the site

USER PERMISSIONS

To build, edit, and manage a community's custom pages:
- "Create and Set Up Communities"

  OR

  `Site.com Publisher User` field enabled on the user detail page

  AND

  Site administrator or designer role assigned at the site level

Setting Custom Authorization

When you select Custom authorization, you get a great deal of flexibility in controlling access to your site. Not only can you control who has access to top level resources, like folders and pages, but you can also set access at the individual resource level.

Using Custom authorization at the folder level is a great way to make a large number of resources private without having to mark them individually. Let's say you periodically run sale offers for your paid users. If you drag all the sale pages into a special folder you mark for authorization, they instantly inherit the folder's setting. Users will need to log in to access them. Plus, if you decide to make one of the sale pages available to everyone, you can simply drag it back into a public folder, or to the root of the All Site Content area.

EDITIONS

Available in:
- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

To manage authorization:
- You must be an administrative user on the site

1. Open you site for editing.
2. Click **Site Configuration** > **Authorization**.
3. Select **Custom**.
4. Click **All Site Content**.
5. Create a folder to hold the private pages if it doesn't already exist.
6. From the folder's Actions menu, select **Requires Authorization**. You'll see the lock appear on the folder. It is now private.
7. Drag any pages you want to make private into the folder. A lock appears on them too.

Example: Let's take another example. If you have a page that you'd like to keep private no matter where it resides, you can set its authorization using the Actions menu. After you set it at the individual resource level, it remains private even if you drag it into a folder that isn't set to private. In other words, an resource marked private is always private until you deselect **Requires Authorization** on the Actions menu.

If you check the Authorization page, you'll see all folders and resources marked private are listed in the authorization table where you can view and delete them.

Removing Site.com Authorization

You can remove authorization for a resource by either deleting it from the authorization table under Site Configuration, or by deselecting **Requires Authorization** from the menu.

EDITIONS

Available in:
- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

To manage authorization:
- You must be an administrative user on the site

1. Open your site for editing.
2. Click **Site Configuration** > **Authorization**.
3. From the authorization table, click **Delete** next to the item you want to remove. Alternatively, navigate to the All Site Content view. Select the resource. From the Actions menu, deselect **Requires Authorization**.

Example: If a resource is explicitly marked as private using the Actions menu, then you must remove authorization from it using the Actions menu. For example, if a page marked private is dragged into a folder that's public, it remains private. Likewise, if you drag it into a folder that's already private, and remove the authorization on that folder, the page will still be private.

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. Access Community Management in either of the following ways:
   - From the community, click in the global header.
   - From Setup, click **Customize** > **Communities** > **All Communities**, then click **Manage** next to the community name.
2. 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" in the Salesforce Help
- "Managing Force.com Site Visualforce Pages" in the Salesforce Help
- "Managing Force.com Site Standard Pages" in the Salesforce Help

SEE ALSO:

Determining the URL of a Site.com Page

Creating Branded Pages from the Community Template

Setting Custom Authorization

Displaying Current Community User Information in Site.com

Displaying Current Community User Information

EDITIONS

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

Available (with limitations) in: **Developer** Edition

USER PERMISSIONS

To build, edit, and manage a community's custom pages:

- "Create and Set Up Communities"

  OR

  `Site.com Publisher User` field enabled on the user detail page

  AND

  Site administrator or designer role assigned at the site level

Site.com designers creating authenticated pages for a community site can display the current user's information by accessing `CurrentUser` namespace expressions.

1. Open the page on which you want to display the current community user's information.
2. From the Page Elements pane, drag a **Content Block** or **Custom Code** page element onto the page.
3. Type *`{!CurrentUser.`* and the value that you want to display.
   For example, `{!CurrentUser.firstName}`.

   Check the list of available expressions for displaying current user information.
4. Add any additional text you require.
   For example, `Welcome back {!CurrentUser.firstName}!`.
5. If you're in a Content Block, click **Save**. If you're in a Custom Code element, click **Save and Close**.

Note: If an unauthenticated user views a page that contains `CurrentUser` expressions, the current user information does not appear. For example, if an unauthenticated user viewed a page that contained the above example, the user would see "Welcome back !" as the welcome message.

Expressions Available for Displaying Current User Information

EDITIONS

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

Available (with limitations) in: **Developer** Edition

Use these `CurrentUser` namespace expressions to display authenticated user information on a Site.com community page.

CurrentUser Expression	Displays
`{!CurrentUser.name}`	Combined first and last name of the user, as displayed on the user detail page.
`{!CurrentUser.firstName}`	First name of the user, as displayed on the user edit page.
`{!CurrentUser.lastName}`	Last name of the user, as displayed on the user edit page.
`{!CurrentUser.userName}`	Administrative field that defines the user's login.
`{!CurrentUser.email}`	Email address of the user.
`{!CurrentUser.communityNickname}`	Name used to identify the user in a community.

Determining the URL of a Site.com Page

After you create a Site.com page, you can determine the page's URL to:

- Provide your users with a URL that lets them access a public page directly.
- Create a link to the page from other pages, including Force.com Sites and Visualforce pages.
- Make it the home page for your community using a URL redirect in Force.com Sites.
- Add a private page to a web tab in your community.

1. To determine the correct URL for the page:
   - From the Create Community wizard, click **Customize**.
   - If you navigated away from the Create Community wizard, click **Customize** > **Communities** > **All Communities**, then click the **Manage** button next to the community name.
2. Copy the URL displayed on the Overview page and paste it into a text editor.
3. To create a URL that points to:
   - The Site.com site's home page, append `/s/` to the URL. For example, `https://mydomain.force.com/mycommunity/s/`.
   - A specific Site.com page, append `/s/<page_name>`, where `<page_name>` is the name of the Site.com page. For example, `https://mydomain.force.com/mycommunity/s/promotion`.

   The URL is case-sensitive and "`s`" must be lowercase.

SEE ALSO:

Adding Authenticated Site.com Pages to Community Tabs

EDITIONS

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

To build, edit, and manage a community's custom pages:

- "Create and Set Up Communities"

  OR

  `Site.com Publisher User` field enabled on the user detail page

  AND

  Site administrator or designer role assigned at the site level

Adding Authenticated Site.com Pages to Community Tabs

After you create a private Site.com page, you can add the page to a tab in your community.

In this case, you need to create a Web tab that points to your Site.com page.

1. In the Properties pane for your page, select `Show Salesforce Header`.

   Selecting this option ensures that you see tabs in your community.

2. Enter the tab name as it should appear on the tab in your community.

   The web tab you create must have the same name.

3. Determine the correct URL for the page.

   The URL must be in the following format `https://`*`mydomain`*`.force.com/`*`mycommunity`*`/s/`*`<pagename>`*, where *`pagename`* matches the name of your page.

4. From Setup, click **Create** > **Tabs**.
5. In Web Tabs, click **New** and enter the name of the tab as it appears in the Tab Name field in your page properties.
6. On the Step 3 screen, paste the URL you created in the Button or Link URL text box.
7. Return to the Create Community wizard and add the new tab to your community.

To preview the private page in your community, you must publish your Site.com site.

Note: You can't publish your site from sandbox.

SEE ALSO:

Add Tabs to Your Community

EDITIONS

Available in:
- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

To build, edit, and manage a community's custom pages:
- "Create and Set Up Communities"

  OR

  `Site.com Publisher User` field enabled on the user detail page

  AND

  Site administrator or designer role assigned at the site level

Add the Global Search Box to Your Customized HTML Header

If you customize your community with an HTML header, you hide the global search box. To take advantage of this search functionality, you need to embed a form similar to this in your customized header.

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

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:

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

Configure a Custom Domain for Your Community

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

> **Note:** Custom domains are supported only in non-sandbox instances. You can configure a custom domain in a sandbox instance and then migrate it to a production instance, but the custom domain is only active in production.

When you add a domain, you also have the option of attaching a certificate and key for connection security. If you're going to use a certificate, make sure you've already added it using Certificate and Key Management before you try to attach it to your domain. Only CA-signed certificates are supported, and they must be 2048 bits in length. To support all domains that are hosted by sites in your organization, use a wildcard or Subject Alternative Name certificate.

1. From Setup, click **Domain Management** > **Domains**.
2. Click **Add a Domain**.
3. Enter the Domain Name.
4. Add a certificate if you have already set up a CA-signed certificate that supports this domain.
5. Click **Save**. Alternatively, click **Save & New** to add multiple domains.

If you plan to host more than one community on a domain, you'll need to set up custom URLs for each site. Custom URLs are the way to uniquely distinguish the communities within that domain. From Setup, click **Domain Management** > **Custom URLs**.

Before you switch the CNAME of your domain name to point to a new target name, ensure that the new target name exists in the DNS by using `dig` or `nslookup`. When you created your domain names affects the target of your CNAME:

- Domain names that were added before Summer '13, typically need to have their CNAME adjusted to point to the fully qualified domain followed by `.live.siteforce.com` instead of to the organization's `force.com` sub-domain. For example, if your pre-Summer '13 domain is `www.example.com`, then the target of its CNAME will need to be `www.example.com.live.siteforce.com` instead of `example.force.com` before HTTPS will work.
- Domain names that were added in or before Summer '13, don't have the 18-character organization ID in the CNAME target.
- Domain names that were added in or after Summer '13, already point to the proper place for setting up HTTPS in a custom domain.
- Domain names that were added in or after Winter '14, use a CNAME that points to the fully qualified domain followed by your organization's 18-character ID and `.live.siteforce.com`. For example, if your domain name is `www.example.com` and your 18-character organization ID is `00dxx0000001ggxeay`, then the target of its CNAME will need to be `www.example.com.00dxx0000001ggxeay.live.siteforce.com`.

USER PERMISSIONS

To view domains:
- "View Setup and Configuration"

To add domains:
- "Customize Application" or "View Setup and Configuration" plus either a Site.com Publisher license or "Create and Set Up Communities"

To edit or delete domains:
- "Customize Application"

To associate certificates with a domain:
- Contact Salesforce if you aren't using Communities. Organization with Communities can associate certificates with a domain.

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, click **Customize** > **Tab Names and Labels** > **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:
- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

To rename the Chatter tab:
- "Customize Application"

  OR

  "View Setup and Configuration"

  AND

  Be designated as a translator

SECURITY & AUTHENTICATION

Authentication Options

Here's an overview of the user authentication options available in Communities. For details, see Customize Login, Logout, and Self-Registration in Your Community.

- Your organization's internal users who belong to a community are required to follow the employee login flow and use their Salesforce username and password.
- The default login option for external users is the username and password that Salesforce assigned for the community. External users are users with Community, Customer Portal, or partner portal licenses.
- If your organization uses single sign-on for identity management, you can use SAML for single sign-on. This allows external users to log in to Salesforce using your corporate identity provider. Communities supports multiple SAML configurations. See Configuring SAML for Communities.

Note: All authentication options also work with custom HTTPS web addresses.

Your organization can allow authentication via an external service provider such as Facebook©, Janrain©, or Salesforce. See Configuring Authentication Providers.

If you want to integrate communities into custom branded apps such as mobile or desktop apps, you can create branded authentication flows using OAuth.

Configuring SAML for Communities

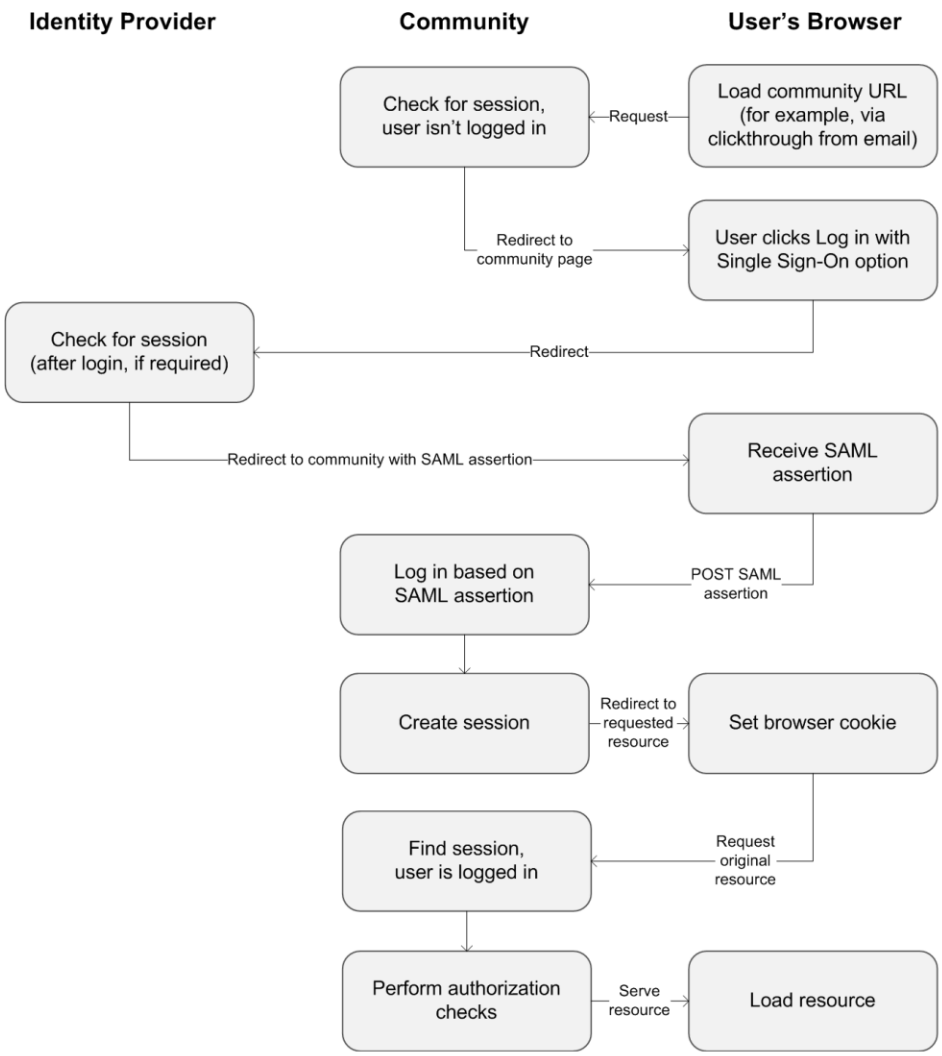
EDITIONS

Available in:
- Enterprise
- Performance
- Unlimited
- Developer

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.



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

Requirement	Standard	Portal	Force.com Sites	Community
URL where SAML assertion POST is made.	login.salesforce.com	login.salesforce.com	login.salesforce.com	*community URL*
Are `organization_id` and `portal_id` required in assertion?	No	Yes–passed as an attribute	Yes–passed as an attribute	No Note: Required if using Just-in-Time provisioning to create portal users in the community. Community-specific portal users can be provisioned with `portal_id` excluded.
Is `siteUrl` required in assertion?	No	No	Yes–passed as an attribute	No

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

```
<samlp:Response ID="_f97faa927f54ab2c1fef230eee27cba21245264205456"
      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. The SAML settings are in Setup, **Security Controls** > **Single Sign-On Settings**.

For more information about configuring SAML, refer to these resources.

- "Example SAML Assertions" in the Salesforce Help
- "Best Practices for Implementing Single Sign-On" in the Salesforce Help
- Single Sign-On with SAML on Force.com

Configuring Authentication Providers

The following information assumes that you are familiar with the use of authentication providers for single sign-on. External users can log in using their credentials from Facebook©, Janrain©, or another Salesforce organization if you set up authentication providers in Setup under **Security Controls** > **Auth. Providers** and choose to display them on the community login page.

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 authenticaton 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');
```

For more information about configuring authentication providers, refer to these resources.

- **About External Authentication Providers**
- **Using the Community URL Parameter**

Configuring 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 for a custom app.

The following information assumes that you are already familiar with OAuth protocols and authentication flows for remote access applications. Communities supports all available authentication flows except for the username-password OAuth authentication flow and the OAuth 2.0 SAML bearer assertion flow. When implementing branded OAuth flows for communities, you configure the authorize URL to use the community URL so that the authentication flow directs users to the application approval page.

EDITIONS

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

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:

```
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. Once they authorize the app, you then set a user access token and refresh token for future authentication. In requests for the token endpoint, you should similarly 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_QJWwYMfAbUeeG7c1E6 LYUfiDUkWe6H34r1AAwOR8B8fLEz6n04NPGRrq0FM"`

For more information about configuring OAuth, refer to these resources.

- Authenticating Apps with OAuth
- 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’s Guide*

ENABLE ADDITIONAL FEATURES

Enabling Integrations in Your Community

You can enable additional integrations, such as Ideas, Chatter Answers, Chatter Questions, and Salesforce Knowledge, in your community to increase collaboration and optimize the network between your internal community members and your customers.

After you have implemented your community, consider integrating other Salesforce features to expand your reach.

- Enabling Chatter Answers in Your Community
- Set Up Chatter Questions in Your Community
- Enabling Ideas in Your Community
- Enabling Salesforce Knowledge in Your Community

Set Up Chatter Questions in Your Community

Chatter Questions helps you promote community engagement internally and externally 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 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. If your organization was created after Summer '14, the Question action is automatically added, but we recommend dragging it to the far left to increase its visibility.

Note: Chatter Questions is not available in communities built on the Koa and Kokua community templates.

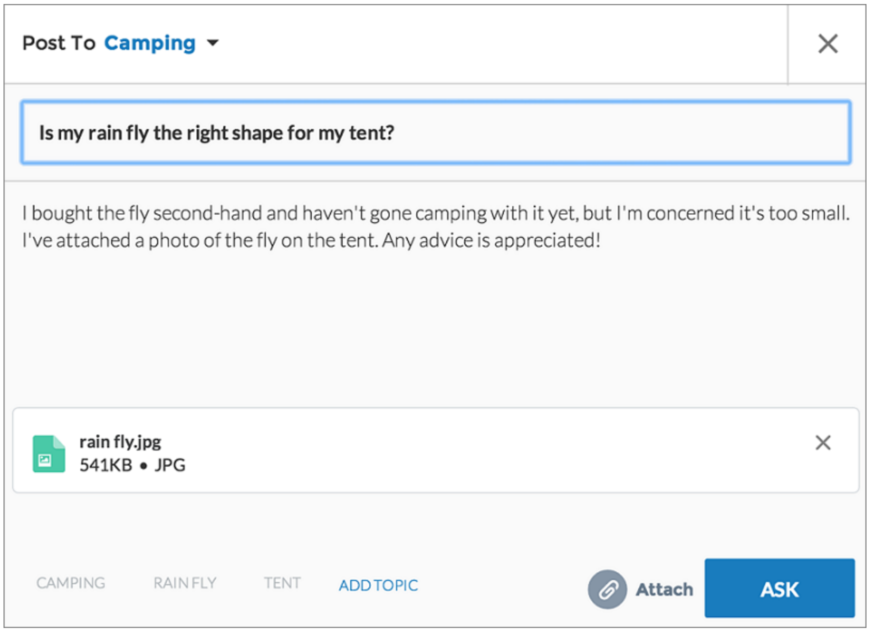
EDITIONS

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

USER PERMISSIONS

To edit the global publisher layout:

- "Customize Application"



To edit the global publisher layout:

1. From Setup, click **Create** > **Global Actions** > **Publisher Layouts**.
2. Click **Edit** next to the global publisher layout.
3. Drag the Question action from the palette to the global publisher layout. If the Question action already appears in the layout, drag it to the location where you want it.
4. Click **Save**.

Note: If you're using a customized publisher layout in groups or on records, make sure that the Question action is added to those layouts as well.

Set Up Question-to-Case in Your Community

Question-to-Case lets moderators create cases from questions in Chatter, which makes it easier to track and resolve your customers' issues. Question-to-Case is available in all communities where Chatter Questions is enabled.

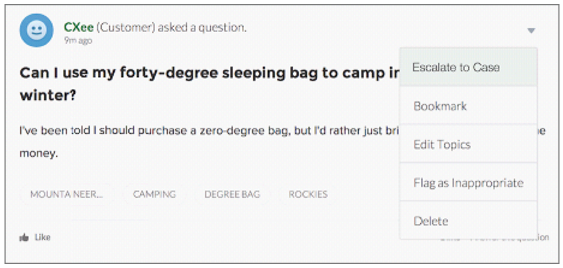
Users with the "Moderate Chatter" user permission can create cases from questions directly in the feed. You can also set up processes—similar to workflow rules—in the Lightning Process Builder to automatically create cases from questions that meet specified criteria. Cases from questions are added to a queue so support agents can claim them.

EDITIONS

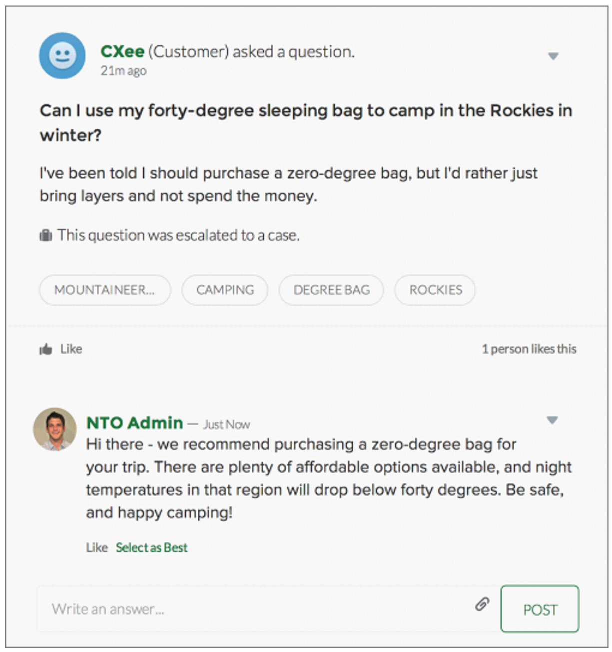
Available in:
- Group
- Professional
- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

To set up Question-to-Case in communities:
- "Customize Application"



When agents find a solution, they can respond to questions directly from the case, and the customer sees the agent's response on the question or in the My Cases view. Agents choose whether the reply is visible to the community, or only to the customer who asked the question.



To set up Question-to-Case:

1. Enable Question-to-Case in your communities.
   a. From Setup, click **Customize** > **Cases** > **Support Settings**.
   b. Select **Enable Question-to-Case in Communities**.
   c. Click **Save**.
2. Add the `Question from Chatter` field to the Case Detail view.
3. Add the Escalate to Case action to the Feed Item layout.
4. Customize the Escalate to Case action layout.
5. Perform optional customizations:
   a. Set up a queue for cases created from questions.
   b. Set up processes to automatically create cases from unresolved questions that meet specified criteria.

For details on steps 2 through 5, search for "Set Up Question-to-Case" in the Salesforce Help.

Enabling 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 enable Chatter Answers in Salesforce Communities:

1. Enable Chatter Answers.
   a. From Setup, click **Customize** > **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, click **Customize** > **Communities** > **All Communities**, then click **Manage** next to the community name.
   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, click **Manage Users** > **Profiles**.
   b. Click **Edit** for the profile that you want to make the Q&A tab visible for.
   c. Under Standard Tab Settings, set the `Q&A` tab to Default On.
   d. Click **Save**.

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

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

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

EDITIONS

Chatter Answers is available in: **Enterprise**, **Developer**, **Performance**, and **Unlimited** Editions.

USER PERMISSIONS

To enable Chatter Answers in Salesforce Communities:

- "Customize Application"

Enabling Ideas in Your Community

EDITIONS

Available in:
- Professional
- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

To customize Ideas settings:
- "Customize Application"

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

To manage organization-wide settings for Ideas:

1. From Setup, click **Customize** > **Ideas** > **Settings**
   a. Select the `Enable Ideas` checkbox to enable or disable Ideas for your organization.
   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. Select `Enable Categories` to let zone members to associate more than one category with an idea by enabling multi-select Categories field . Once you enable multi-select categories, you can't disable it.
   d. Select `Enable Reputations` to let users earn points and ratings based on their activity in each zone.
   e. 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 information for Ideas.
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 by clicking the Plus icon (+) that appears to the right of your current tabs and clicking `Customize My Tabs` on the All Tabs page.

Enabling Salesforce Knowledge in Your Community

What you need to use Salesforce Knowledge with Communities.

You can use Communities to access your knowledge base articles if your Salesforce organization has a Salesforce Knowledge license. Once Salesforce Knowledge is enabled, complete the following steps to view articles in your communities.

1. Update profiles:
   - Clone the Customer Community User, Customer Community Plus User, or Partner Community User profiles and enable the "Read" permission for article types you want to share with community users.
   - Verify that the tab visibility for the Articles (or Knowledge) tab is Default On.
   - Remember to click **Edit Profiles**, at the bottom of the detail page, and activate the new profile.
2. Add the Knowledge tab to each community.

   Note: Communities' users without the Knowledge One permission cannot access Knowledge through Communities.
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

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

Salesforce Knowledge is available in: **Performance** Edition.

Salesforce Knowledge is available for an additional cost in: **Enterprise**, **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 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"

EDUCATE YOUR USERS ABOUT COMMUNITIES

Sharing Personal Contact Information within Communities

Users can specify how much of the contact information from their profile is visible to external users, such as customers and partners, and guest users 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 of their contact information.

Use either the user interface or API to control visibility. In the global header, click `Your Name` > **Edit Contact Info** to edit your contact information and visibility settings. 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 Site.com and Force.com sites, and 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	Public	Go to `Your Name` > **Edit Contact Info**, then click **About**	Always visible to everyone unless your administrator enables nickname	N/A

Contact Information	Default Visibility	Where to Set in User Interface	Options for Restricting Visibility	API Controls on User Object
			display or customizes what information displays using Visualforce or Site.com. If your administrator has enabled nickname display, your nickname displays in place of your first and last names in most locations.	

Title	External	Go to *Your Name* > **Edit Contact Info**, then click **About**	Employees, external, or public	`UserPreferencesShowTitleToExternalUsers`
				`UserPreferencesShowTitleToGuestUsers`
				Note: When the guest user preference is set to `true`, the job title field is visible to external members even if the external member preference is set to `false`.

Profile photo	External. Users without access see the stock photo.	On your profile page, click **Update** under your photo (or **Add Photo** if you haven't added a photo yet), then select `Show in communities with publicly accessible pages`	External or public	`UserPreferencesShowProfilePicToGuestUsers`

City
State
Zip/Postal Code
Country
	Employees	Go to *Your Name* > **Edit Contact Info**, then click **Contact**	Employees, external, or public	Note: For each pair of preferences controlling the visibility of a field, when the guest user preference is set to `true`, the field is visible to external members even if the external member preference is set to `false`.
				`UserPreferencesShowCityToExternalUsers`
				`UserPreferencesShowCityToGuestUsers`
				`UserPreferencesShowCountryToExternalUsers`
				`UserPreferencesShowCountryToGuestUsers`
				`UserPreferencesShowPostalCodeToExternalUsers`

Contact Information	Default Visibility	Where to Set in User Interface	Options for Restricting Visibility	API Controls on User Object

				`UserPreferencesShowPostalCodeToGuestUsers`
				`UserPreferencesShowStateToExternalUsers`
				`UserPreferencesShowStateToGuestUsers`

All other fields	Employees	Go to *Your Name* > **Edit Contact Info**, then click **Contact** or **About**	Employees or external	`UserPreferencesShowEmailToExternalUsers`
				`UserPreferencesShowFaxToExternalUsers`
				`UserPreferencesShowManagerToExternalUsers`
				`UserPreferencesShowMobilePhoneToExternalUsers`
				`UserPreferencesShowStreetAddressToExternalUsers`
				`UserPreferencesShowWorkPhoneToExternalUsers`

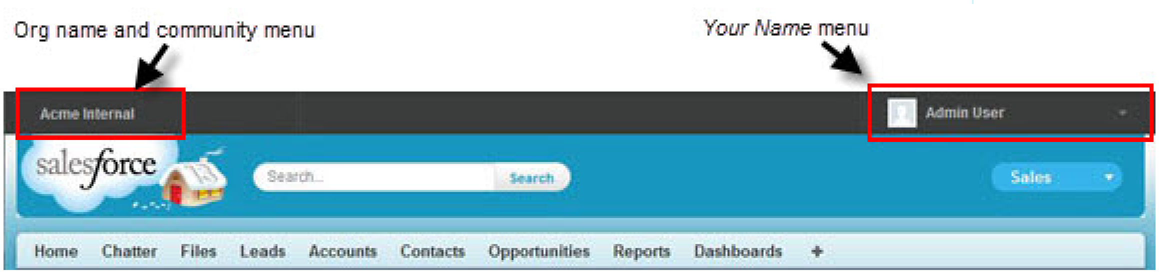
Navigating to Communities

You can easily switch between working in your internal organization and collaborating with customers or partners in communities. The global header is not available by default, the administrator for your organization must enable it for community members.

EDITIONS

Available in:
- Enterprise
- Performance
- Unlimited
- Developer

Note: Organizations who enabled Communities prior to Winter '14 see the new global header by default when they turn on Communities.



The menu on the left side lets you switch between communities and your internal organization.

- To access communities from within your organization, click next to *Organization Name* in the drop-down and select the community you want to switch to. The drop-down shows `Active` communities that you're a member of. If you have the "Create and Set Up Communities" permission, you also see `Preview` communities that you're a member of.
- To return to your internal organization, click next to *Community Name* in the drop-down and select your organization name.

Internal users who aren't members of any community just see the company name. External users see the drop-down menu only if they belong to more than one active community.

Note: If an external user who is only a member of one `Active` community is given the URL for a `Preview` community, they won't see the drop-down menu when in the `Preview` community.

You can work in more than one community at a time if you open each one in a different browser tab.

Switching between your internal organization and your communities doesn't have to disrupt your workflow. We automatically return you to the page where you were last working, so you can pick up right where you left off.

Note: If your organization is in the process of setting up My Domain but hasn't finished deployment of the new custom domain, switching from a community to your internal organization directs you to the Salesforce login page instead. This can happen when you've logged in using a My Domain URL that has been registered but not yet deployed. Once your domain is deployed, selecting your organization in the drop-down directs you to the internal organization as expected.

The *`Your Name`* menu on the right side contains links to edit your 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.

Search Behavior in Communities

EDITIONS

Available in:
- Enterprise
- Performance
- Unlimited
- Developer

In general, searches within a community return results specific to that community. Search behavior also depends on whether Chatter is enabled in your organization.

If Chatter is enabled in your organization, global search and contextual feed search are enabled by default in all communities.

- With global search, users can search for records, files, people, groups, topics, and feed posts and comments.
- Feed search ( ) is helpful when users want to look for information in a specific feed context, such as in groups, on a user's profile, in a record feed, or in the community feed.

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.

Search behavior in communities is different from searches in the internal organization:

- In general, searches within a community return matches from within the community. To find items from a different community, users must leave the current community and search from within the other community.
- In search results in a community, users can see what they have access to through their profiles or permission sets in addition to what is explicitly shared with them in the community. This may include internal company content and records not explicitly shared in the community. For example, if the user's profile allows access to account information, and the accounts tab isn't made visible in the community, the user is able to access account information from their search results.
- For user searches performed by external community members, global search and enhanced lookup search (with the **All Fields** option selected) query the following limited set of fields:
  - Name
  - Username
  - User ID
  - Body
  - Email
  - Phone
  - Custom fields

For example, if an external community member searches for a user, John Doe, by his alias, `jdoe`, and that term isn't contained in any of the searchable fields, the user John Doe isn't included in search results.

- Search results for records and files are not limited to data made visible within the community. Record search results include all the records a user has access to across all communities, including the internal organization's records if they have access. 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
- To enable search result filters for an object in a community, the administrator must enable them for that object from within the internal organization.

Resetting 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. The email includes a link. When the user clicks the link, they will be required to reset their password before proceeding.

APPENDICES

Who Can See What in Communities

EDITIONS

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

Communities contain various types of users who require varying levels of access. What users see depends on their user type and which tabs the administrator selects when creating the community. The behavior outlined below also doesn't take into account updates to your sharing model or user sharing.

	Administrator or Salesforce user with "Create and Set Up Communities" permission	**Salesforce Community Member (all Salesforce licenses including Chatter Free and Chatter Only)**	**External Community Member (Customer Portal, Partner Portal, Partner Community, or Customer Community license)**
Manage 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.	No	No
Global Header	The drop-down in the global header shows a list of communities the user created or has access to. Also links back to their internal organization. Can access setup for all communities regardless of status. Can see communities in `Preview` status.	The drop-down in the global header shows a list of communities the user created or has access to. Also links back to their internal organization. Can't access communities in `Inactive` status. Can see communities in `Preview` status if a link is provided.	The drop-down in the global header shows a list of communities the user has access to. Can't access communities in `Inactive` status. Can see communities in `Preview` status if a link is provided.

	Administrator or Salesforce user with "Create and Set Up Communities" permission	Salesforce Community Member (all Salesforce licenses including Chatter Free and Chatter Only)	External Community Member (Customer Portal, Partner Portal, Partner Community, or Customer Community license)
`Your Name` menu in Global Header	Same as in internal organization.	Same as in internal organization. Chatter Free users see a My Settings menu, an Edit Contact Info menu, and a Logout link. For Chatter Free users, the My Settings menu opens an overlay where they can update location settings, security settings, email settings, and approved connections. These settings apply across the internal organization and all communities that users have access to. This overlay is different from the My Settings page that other internal users see if the organization has enabled the improved Setup user interface.	Can see a My Settings menu, an Edit Contact Info menu, and a Logout link. For external users, the My Settings menu opens an overlay where they can update location settings, security settings, email settings, and approved connections. These settings apply across all communities that users have access to. This overlay is different from the My Settings page that other internal users see if the organization has enabled the improved Setup user interface.
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 fields only if the member has chosen to show them.
Records (such as accounts, leads, opportunities)	Can see records they have access to (based on sharing rules) across all communities and their internal organization.	Standard Salesforce user sees records they have access to (based on sharing rules) across all communities and their internal organization. Chatter Free user doesn't have access to records.	Can see records they have access to (based on sharing rules and permissions) across all communities.

	Administrator or Salesforce user with "Create and Set Up Communities" permission	Salesforce Community Member (all Salesforce licenses including Chatter Free and Chatter Only)	External Community Member (Customer Portal, Partner Portal, Partner Community, or Customer Community license)
Dashboards and Reports	Can view and create dashboards and reports		Users with Partner Community or partner portal licenses can view dashboards and reports for objects and records that have a private sharing model AND to which the user has access, regardless of the current community. Partner Community users can't refresh dashboards. Users with Customer Portal or Customer Community licenses don't have access to dashboards and reports.
Salesforce Knowledge Articles	Salesforce Knowledge User License, `Read` permission on the article type, and visibility on the category.	Salesforce Knowledge User License, `Read` permission on the article type, and visibility on the article's category.	Visibility on the article's category.

Chatter Visibility

	Salesforce Administrator	Salesforce Community Member (all Salesforce licenses including Chatter Free and Chatter Only)	External Community Member (Customer Portal, Partner Portal, Partner Community, or Customer Community license)
Groups	Within a community, user can see all groups for that community and join them, but can't see groups from other communities they belong to or their internal organization. Can create new groups. In groups user is a member of, can post, comment, post files or links, or share someone else's post. Administrators can also control whether users in the organization and external users can create new groups through	Within a community, user can see all groups for that community and join them, but can't see groups from other communities they belong to or their internal organization. Can create new groups. In groups user is a member of, can post, comment, post files or links, or share someone else's post.	Within a community, user can see all groups in the community and join them, but can't see groups from other communities they're a member of. Can create new groups. In groups user is a member of, can post, comment, post files or links, or share someone else's post.

	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)
	the "Create and Own New Chatter Groups" user permission.		
Files	Regardless of the current community, users see Chatter 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. Files posted to groups and shared with an entire community can only be viewed in that community.		Regardless of the current community, users see files they own, that are shared with them directly, or that they have access to in a library. Portal users see files posted to records they have access to, unless the record post was marked "Internal Only".
Profiles	Can see profiles for all members in the current community.		Can see profiles for all members in the current community. Cannot see profiles of users in the internal organization. Profile visibility enforces user sharing.
Recommendations	User gets people, group, file, and record recommendations for the current community only.		
Activity and Influence	Can see activity statistics and influence for the current community. 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.		Can see activity statistics and influence for the current community. All activity on records, such as posts and comments, is not counted in the user's activity statistics and influence.
Email Notifications	Email notification preferences are set by community. Within a community, users can control their Chatter email notifications in their personal settings. Can control email notifications for their internal organization from `Your Name` > **My Settings** > **Chatter** > **Email Notifications**. Within a community, all users can control group email notifications on each group's page.	Email notification preferences are set by community. Within a community, standard Salesforce user can control their Chatter email notifications in their personal settings. Can control email notifications for their internal organization from `Your Name` > **My Settings** > **Chatter** > **Email Notifications**. Chatter Free user can control Chatter emails for their communities under `Your`	Email notification preferences are set by community. Within a community, external users can control their Chatter email notifications under `Your Name` > **My Settings** > **Email Settings**. Portal users can also control group email notifications on each group's page. 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

	Salesforce Administrator	Salesforce Community Member (all Salesforce licenses including Chatter Free and Chatter Only)	External Community Member (Customer Portal, Partner Portal, Partner Community, or Customer Community license)
	Chatter 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.	`Name` > **My Settings** > **Email Settings**. The chosen settings apply to the current community. Within a community, all users can control group email notifications on each group's page. 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.	groups exceed 10,000 members. All members who had this option selected are automatically switched to daily digests.
Topics	Can see hashtag topics and Chatter topics, including topics in feeds, the topics list, topic detail pages, 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 internal organization and any communities they're a member of. Can send a Chatter message to a member of a common community, but must initiate the message within the community that the target user is a member of. Administrators with "Manage Chatter Messages" and "API Enabled" permissions can delete messages.	In their list of Chatter messages, can see private messages they have sent or received in their internal organization and any communities they're a member of. Can send a Chatter message to a member of a common community, but must initiate the message within the community that the target user is a member of.	In the user's list of Chatter messages, can see all messages they have sent or received in any community they're a member of. Can send a Chatter message to a member of a common community, but must initiate the message within the community that the target user is a member of. Chatter messages are accessed through the Chatter tab, which may be disabled for external community members. Administrators should ensure that the Chatter tab is enabled

	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)
	The API allows users to send Chatter messages across communities.		if using Chatter messages in communities.
Messenger (Chat)	Messenger is not available with Communities.		

Feeds Visibility

The following table shows what each kind of user can do or see in Chatter Feeds within a community.

	Salesforce Administrator	Salesforce Community Member	External Community Member (Customer Portal, Partner Portal, Partner Community, or Customer Community license)
Post on a record	Can post on any records within the community.	Can post on any records within the community to which the user has access.	Can post on any records within the community to which the user has access.
Bookmark a post	Can bookmark posts within the current community. The Bookmarked feed only contains posts from the current community.		
Mention someone	Can mention people specific to 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.

<table>
<tr><th>Search Results For</th><th>Administrator</th><th>Salesforce Community Member</th><th>External Community Member (Customer Portal, Partner Portal, Partner Community, or Customer Community license)</th></tr>
<tr><td>People</td><td colspan="3">People specific to the current community.</td></tr>
<tr><td>Users</td><td colspan="3">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.
Portal users can’t search for users in the community when sidebar search is enabled.
When external community members search for users, global search and enhanced user lookups (with the All Fields option selected) query the following limited set of fields on user records:
Name
Username
User ID
Body
Email
Phone
Custom fields</td></tr>
<tr><td>Groups</td><td colspan="3">Groups specific to the current community.</td></tr>
<tr><td>Files</td><td colspan="2">Visibility in the current community:
Owned files
Files shared with the user in a public or private group
Files shared with the entire community
Visibility in any community:
Files posted on accessible records and record feeds
Salesforce CRM Content library files that the user has access to
Files owned by a user are always visible in search results for that user, regardless of how they were uploaded.</td><td>Visibility in the current community:
Owned files
Files shared with the user in a public or private group
Files shared with the entire community
Visibility in any community:
Files posted on accessible records and record feeds (unless the file posted on the record is marked “Internal Only”)
Salesforce CRM Content library files that the user has access to
Files owned by a user are always visible in search results for that user, regardless of how they were uploaded.</td></tr>
</table>

Search Results For	Administrator	Salesforce Community Member	External Community Member (Customer Portal, Partner Portal, Partner Community, or Customer Community license)
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 accessed across all communities. If user sharing is enabled in your organization, this behavior may vary depending on how it's configured. For external community members, enhanced user lookups search within a limited set of fields when the **All Fields** option is selected.
Lookup searches on records	Full visibility for all items across all communities and your internal organization.	Visibility for all items the user has access to through their user profile or permission sets across all communities and your internal organization.	Visibility for all items the user has access to through their user profile or permission sets across all communities.

Search Results For	Administrator	Salesforce Community Member	External Community Member (Customer Portal, Partner Portal, Partner Community, or Customer Community license)
Salesforce Knowledge Articles	Salesforce Knowledge User License, `Read` permission on the article type, and visibility on the category.	Salesforce Knowledge User License, `Read` permission on the article type, and visibility on the article's category.	Visibility on the article's category.

Communities Limits

Communities Site Limits

Communities sites have a few limits that affect your users. These limits apply only when non-authenticated users access community pages built using Force.com Sites.

Edition	Bandwidth Limit (per rolling 24-hour period per community)	Service Request Time (per rolling 24-hour period per site)	Maximum Page Views
Developer Edition	500 MB	10 minutes	N/A
Enterprise Edition	1 GB for sandbox 40 GB for production	30 minutes for sandbox 60 hours for production	500,000
Unlimited Edition Performance Edition	1 GB for sandbox 40 GB for production	30 minutes for sandbox 60 hours for production	1,000,000

Bandwidth

The number of megabytes served and received from both the community's origin server and the cache server. The origin server refers to the Web server that hosts your community site. The cache server refers to the CDN server that serves your cache community site pages."Rolling 24-hour period" refers to the 24 hours immediately preceding the current time.

Service Request Time

The total server time in minutes required to generate pages for the community.

"Rolling 24-hour period" refers to the 24 hours immediately preceding the current time.

Page View

A request from a non-authenticated community user to load a page associated with your community. Requests from authenticated community users are not counted as page views.

Page views are aggregated in 24 hour times periods (GMT). Billing is based on the number of monthly page views purchased for your organization. This page view limit is cumulative for all sites in your organization.

Note: Limit Exceeded, Maintenance, Page Not Found, and designated Inactive Home pages aren't counted against page view and bandwidth limits.

Communities User Limits

User limits depending on the type of community.

To avoid deployment problems and any degradation in service quality, we recommend that the number of users in your community not exceed the limits listed below. If you require additional users beyond these limits, contact your Salesforce account executive. Exceeding these limits may result in additional charges and a decrease in functionality.

Type of Community	Number of Users
Partner or Customer Community Plus	300,000
Customer	7 million

Portal Roles Limit

Limits for portal roles in your organization.

The maximum number of portal roles for an organization is 5000. This limit includes portal roles associated with all of the organization's customer portals, partner portals, or communities. To prevent unnecessary growth of this number, we recommend reviewing and reducing the number of roles for each of your portals and communities. Additionally, delete any unused portal roles. If you still require more portal roles, please contact Salesforce Customer Support.

Communities Groups Email Limit

Email limits for groups that exceed a certain number of members.

In communities the `Email on Each Post` option is disabled once a group exceeds 10,000 members. All members who had this option selected are automatically switched to `Daily Digests`.

Person Account Communities User Limits

Limits for the number of person account Partner Community users that a single user can own.

A Salesforce user can be the owner of up to 1000 person account portal users. This includes all partner portal and Partner Community person account users. Person account users with Customer Portal, High Volume Customer Portal, or Customer Community licenses don't count against this limit.

Communities Report and Dashboard Limitations

If the Reports and Dashboards tabs are exposed in the community, external users with Partner Community, Gold Partner, Silver Partner, Customer Community Plus, Customer Portal Manager Standard, and Customer Portal Manager Custom (for Enterprise Administration users) licenses can access reports and dashboards with some limitations.

External users with Customer Community, High Volume Portal User, Service Cloud Portal, and Authenticated Website licenses don't have access to dashboards.

External users can't:

- Make copies of, edit, or delete reports and dashboards
- Schedule reports or dashboards for email and refresh at a specific date and time
- Refresh dashboards to see latest data (however, external users with super user access can)

External users with super user access (partner users with the "Partner Super User Access" permission and customer users with the "Portal Super User" permission) can:

- Be selected for the "Run as specified user" option.
- Refresh dashboards they have access to.

  External users with super user access can refresh dashboards set up with "Run as specified user" and "Run as logged-in user" up to 100 times daily per organization. Scheduled and automatic refreshes don't count against the limit. There is no refresh limit for internal users.

  After the initial refresh, the data is cached for 24 hours.

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