Experience Cloud

Salesforce, Winter ’22

@salesforcedocs
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CONTENTS

SET UP AND MANAGE EXPERIENCE CLOUD SITES

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

Salesforce Experience Cloud lets you create branded spaces for your employees, customers, and partners. You can customize and create experiences, such as communities, sites, or portals, to meet your business needs and then transition seamlessly between them.

> **Important:** To better reflect the many types of connected digital experiences you can create—including portals, websites, help centers, forums, and mobile apps—Community Cloud is now called Experience Cloud.
>
> So what's different? Terminology, for starters. Whether you're creating a forum, portal, or any other type of digital experience, at the most basic level, you're building an online site. So instead of saying *community*, which primarily connotes a forum where people interact with one another, we now use the term *site* in the user interface and documentation.
>
> And if you accidentally enter `Community` in the Quick Find box in Setup, we automatically display the renamed Digital Experiences menu instead—we know that old habits are hard to break!
>
> For more details on terminology changes, see the Spring '21 Release Notes.

You can use Experience Cloud sites 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

Base your site on one of our preconfigured Experience Builder templates with drag-and-drop Lightning components, or on standard Salesforce functionality and tabs. With Experience Cloud, you can share a subset of features and data from your internal Salesforce org, and customize it to use your company branding.

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

Check out Communities and Community Users in Your Salesforce Org, a quick video about how Salesforce Experiences live in an org, the differences between licenses, and how Salesforce accounts and site users are associated with one another.

IN THIS SECTION:

Experience Cloud Authentication and Security

You can help keep your Experience Cloud site more secure by enabling clickjack protection, authenticating users, encrypting data, and protecting against malicious resources and vulnerabilities in components using CSP and Lightning Locker. All these options allow you to maintain the security of your site while still using the external sources you need.

Securely Share Your Experience Cloud Sites with Guest Users

Experience Cloud sites help you connect with customers and partners. When building your site, you can use various settings and permissions to protect your data and your customers' data, and publicly share the site with guest users. Keeping your data secure is a joint effort between you and Salesforce.

Which Experience Cloud Template Should I Use?

Experience Cloud templates let you build responsive sites for delivering rich, branded spaces for your customers and partners. And with Experience Builder, you can accomplish a lot without coding. For example, you can edit a template's components to include information about your site, add images to extend your branding, and include CMS content. And if you want a more customized experience, you can create custom pages, add components to pages, build custom Lightning components, and expose more Salesforce objects.

Customize Sites with Experience Builder

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

Improve Experience Cloud Site Performance

Use the Page Optimizer to analyze your site's performance. Use the **Experience Cloud Content Delivery Network** and **browser caching** to improve page load times.

Add Salesforce CMS Content to Your Experience Cloud Site

Salesforce CMS is a hybrid content management system that lets you create and manage content in a central location and then share that content across multiple channels, including Experience Builder sites. After you create content in the Salesforce CMS app, you can add the content to site pages so that your customers can see it.

Connect Your External CMS to Your Experience Builder Site

Do you have a website built in an external content management system (CMS)? You can connect that CMS content to your Experience Builder site for consistent branding, reuse of material, and ease of maintenance.

Lightning Bolt for Salesforce: Build Once, Then Distribute and Reuse

Lightning Bolt for Salesforce lets you quickly build and distribute industry-specific Lightning Bolt Solutions to jump-start new org capabilities. Save time by building once and then reusing. Whether it's for your own org or you're a consulting partner or ISV, you can reduce the time required to implement solutions and cut development costs.

Experience Management

Experience Management is your one-stop shop for administering, managing, and moderating your Experience Cloud site.

Experience Cloud and Marketing Cloud Integration with Journey Builder

With the Marketing Cloud Journey Builder, create personalized journeys for your site based on triggering events or geared for specific audiences. Greet new users with rich content emails, send reminders to users who need profile pics, or schedule follow-up emails for users who log a case. To use this feature, you must have both Experience Cloud and Marketing Cloud licenses.

Insights for Engagement

Insights are reports that help community managers monitor activity and take action on that activity. Insights make it easier to manage day-to-day moderation tasks, encourage engagement, and drive member adoption. You can set up Insights to monitor new members, unanswered questions, newly created groups, trending topics, and even recent Chatter contributions.

Experience Cloud Site Moderation Strategies and Tools

Moderation allows you to empower members of your Experience Cloud site to monitor content and ensure that it's appropriate and relevant. Set up rules to automate moderation and do the heavy lifting for you.

Organize Experience Cloud Sites with Topics

Navigational, featured, and content topics are a fantastic way to organize information and content in an Experience Cloud site. Use topics to structure your site's content or highlight key discussions. You can create topics or use the topics that organically emerge from site member posts.

Customize Recommendations in Experience Cloud Sites

Create recommendations to drive engagement for your Experience Cloud site, encouraging users to watch videos, take trainings, and more. Target specific audiences and use channels to specify locations for the recommendations.

Gamification

Use gamification tools, like Recognition Badges and Reputation, to keep your members engaged in your site.

Reporting for Experience Cloud Sites

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

Educate Your Users About Salesforce Experiences

Tell users what to expect from Experience Cloud sites.

Experience Cloud Resources

SEE ALSO:

Plan Your Implementation

Enable Digital Experiences

Create an Experience Cloud Site

Manage Your Experience Cloud Site

Experience Cloud Resources

Experience Cloud Overview

Experience Cloud sites are a great way to share information and collaborate with people who are key to your business processes, such as customers, partners, or employees. Whether you call it a portal, a help forum, a support community, HR central, or something else, an Experience Cloud site is a great place to connect with the important folks in your life in a new and different way. Use easy point-and-click branding tools with ever-evolving Experience Builder templates or go with Visualforce to create branded collaboration spaces.

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So what's different? Terminology, for starters. Whether you're creating a forum, portal, or any other type of digital experience, at the most basic level, you're building an online site. So instead of saying *community*, which primarily connotes a forum where people interact with one another, we now use the term *site* in the user interface and documentation.

And if you accidentally enter `Community` in the Quick Find box in Setup, we automatically display the renamed Digital Experiences menu instead—we know that old habits are hard to break!

For more details on terminology changes, see the Spring '21 Release Notes.

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

Base your site on one of our preconfigured Experience Builder templates with drag-and-drop Lightning components, or on standard Salesforce functionality and tabs. With Experience Cloud, you can share a subset of features and data from your internal Salesforce org, and customize it to use your company branding.

Learn About Experience Cloud

Before you create an Experience Cloud site, we recommend going over a few key concepts in Trailhead.

- Expand Your Reach with Experience Cloud (Trail)
- Communities and Community Users in Your Salesforce Org (Video)

Create, Design, and Manage Experience Cloud Sites

- Set Up and Manage Experience Cloud Sites (PDF)
- Community Management Guide for Experience Cloud (PDF)
- Report on Experience Cloud Sites with AppExchange Packages
- Google Analytics™ for Salesforce Communities Package
- SEO for Experience Builder Sites
- Who Sees What in Communities Series (Video)

Limitations, Supported Browsers, and Mobility

- Communities User Licenses
- Supported Browsers for Experience Cloud Sites
- Access Experience Cloud Sites in the Salesforce Mobile App

Add Advanced Customizations

- LWR Sites for Experience Cloud
- Experience Cloud Developer Guide
- Experience Cloud Developer Center
- Build a Custom Theme Layout Component for Lightning Communities (Project)
- Customize Your Experience Cloud Site (Trail)
- Lightning Aura Components Developer Guide
- Lightning Web Components Developer Guide
- Visualforce Developer Guide
- Visualforce Component Reference

AppExchange Packages to Use with Experience Cloud Sites

- Community Management Package for Communities with Chatter

- Community Management Package for Communities without Chatter

Going from Portals to Experience Cloud Sites

- Create and Manage Partner Portals (PDF)

Stuck? Ask for Help in a Trailblazer Community

- Experience Cloud
- Community Management

IN THIS SECTION:

Plan Your Implementation

It helps to make a few key decisions before setting up and customizing your Experience Cloud site.

How Experience Cloud Uses Lightning

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

Supported Browsers for Experience Cloud Sites

Browser support for Experience Cloud sites varies by the device that you access the site from and the site template.

Access Experience Cloud Sites in the Salesforce Mobile App

Accessing Experience Cloud sites from the Salesforce mobile app depends on several factors, including the type of template used to create the site and the licenses and permissions of site users.

Experience Builder Site Limitations

Be aware of the limitations that apply to Experience Builder sites such as Customer Service and Partner Central.

Experience Cloud Sites Usage Allocation

Experience Cloud site usage is governed by daily, monthly, and yearly allocations. Understanding these allocations is important to the success of your sites. Salesforce provides tools to help you monitor site usage so that you can avoid exceeding these allocations, or purchasing overages when needed.

Plan Your Implementation

It helps to make a few key decisions before setting up and customizing your Experience Cloud site.

- Define the business requirements of the Experience Cloud site. What types of users are you creating the site for? You could start by identifying the main use cases you want to support, such as customer support, self-service, or marketing.
- Determine your licensing requirements based on the current and projected number of site users.
- Decide if you want your site content to be publicly available to guest users without licenses
- Plan the look-and-feel of your site and then evaluate the available customization options. With Experience Cloud, you have the following choices:
  - **Experience Builder sites**: Experience Builder comes with rich, responsive templates targeted at varied use cases, such as customer support, partner relationship management, and more. These ever-evolving templates offer easy customization and branding via point-and-click tools and allow for a quick rollout of your site. This option doesn't require programming experience, although you can quickly extend your customizations programmatically as needed.

- **Visualforce + Salesforce Tabs sites**: These sites come with some branding themes that you can use along with standard Salesforce tabs in your sites. In addition, you can use Visualforce to customize your site's appearance and use all the capabilities of the Lightning Platform. This option requires programming capabilities.

IN THIS SECTION:

Choosing Between Experience Builder and Salesforce Tabs + Visualforce Sites

When you create an Experience Cloud site, you can create an Experience Builder or a Salesforce Tabs + Visualforce site. With either option, you can build branded, publicly available pages such as landing or marketing pages, and private custom pages that only members can access. So which option is the best for you? Well, that depends on your skills and the needs of your org.

Experience Builder Sites

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

- Create the site that's right for you, using the following templates: Customer Service, Partner Central, Customer Account Portal, Build Your Own (Aura), or Help Center.
- Enjoy Lightning extensibility including new pages, new navigation items, custom layouts, new components, and access to AppExchange.
- Design pixel-perfect branded pages including your own CSS styles. Control the look and feel of the site with a custom theme layout and custom components.
- Create public pages that anyone can access, or add private pages that require users to log in.
- Build and iterate quickly using drag-and-drop reusable page components.
- 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 org's data.
- Easily support multilingual experiences through Translation Workbench and Experience Builder.
- Reuse your Visualforce pages, actions, buttons, links, and canvas apps in Experience Builder sites.
- Create and export industry-specific solutions and use them to jump-start new sites, or package and distribute them for others, using Lightning Bolt solutions.

Salesforce Tabs + Visualforce Sites

Suitable for developers with experience using Visualforce, Salesforce Tabs + Visualforce lets you build custom pages and apps with Lightning Platform capabilities, including analytics, workflow and approvals, and programmable logic. If you want to create sites programmatically using Apex and APIs, Salesforce Tabs + Visualforce is the way to go. With Salesforce Tabs + Visualforce sites you can:

- Support high volume authenticated visitors and concurrent transactions while maintaining low page-load times.
- Harness Lightning Platform capabilities including analytics, workflow and approvals, and programmable logic.
- Integrate with partner apps (managed packages) that use Visualforce.
- Use 3rd-party web application frameworks for site rendering.

- Take advantage of dynamic web applications, such as an event management application.
- Create private pages that you can add as a tab within your site.
- Write your own controllers, or extensions to controllers, using Apex code.
- Build dynamic web applications, such as an event management application.

Features at a Glance

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

Feature	Experience Builder Sites	Salesforce Tabs + Visualforce Sites
Public pages	✓	✓
Preconfigured templates and page layouts	✓	
Authenticated pages	✓	✓
Lightning Bolt Solutions	✓	
Visualforce pages (Add Visualforce pages to Experience Builder sites using the Visualforce Page component in Experience Builder.)	✓	✓
Audience targeting for pages and groups	✓	
Custom themes	✓	✓
Out-of-the-box login, logout, self-registration, and error pages	✓	✓
Drag-and-drop environment	✓	
Lightning components	✓	
IP restrictions	✓	✓
Access to standard and custom objects	✓	✓
Analytics and reports	✓	✓
Programmatic customizations using Apex, APIs, and controllers	✓	✓
Workflows	✓	✓
Flows	✓	
Full Lightning Platform capability	✓	✓
Custom objects	✓	✓

How Experience Cloud Uses Lightning

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

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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What is Salesforce Lightning?

Lightning includes a new experience, framework, and environment. Lightning makes it easier to build responsive applications for any device.

Lightning includes these technologies:

- **Lightning Component Framework**, which gives you a UI development framework that accelerates development and app performance.
- **Lightning App Builder** lets you build Lightning pages visually, without code, using standard and custom Lightning components. You can make your Lightning components available in the Lightning App Builder, so admins can build custom user interfaces without code.
- **Experience Builder** is like the Lightning App Builder, except that it's used to design and build Experience Builder sites using Lightning components. Just like Lightning App Builder, you can use standard or custom components so admins can create Experience Builder pages with point-and-click customization.

Some Salesforce products built with the Lightning framework include Lightning Experience, the Salesforce mobile app, and the various Experience Builder site templates (like Customer Service, Partner Central, and Help Center) and Lightning Bolt Solutions.

What is Lightning Experience?

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

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

Lightning in the context of Experience Cloud means the use of Lightning components to build communities, sites, and portals. Build using templates, such as Customer Service, Partner Central, or Lightning Bolt Solutions.

How is the Lightning framework used in Experience Cloud sites?

Experience Cloud sites and Lightning Experience use the same *underlying* Lightning framework technology—but it isn't necessary to enable Lightning Experience to use Experience Cloud sites.

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

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

Do I first turn on Lightning Experience in my internal org to use Experience Builder sites?

No. It's not required that you enable Lightning Experience to use Experience Builder sites, such as Customer Service, Partner Central, and Lightning Bolt Solutions. Experience Cloud sites use the same underlying technology as Lightning Experience, *but are independent of one another*.

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

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

You can build your site with the Lightning framework or with Visualforce. The UI enabled in your internal Salesforce org makes no difference to what UI technology you use for your external-facoing site.

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

Yes! See the *Experience Cloud Developer Guide* for more information.

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

No. By definition, a Salesforce Tabs + Visualforce site uses Visualforce technology under the hood. There's no button in a Salesforce Tabs + Visualforce site that allows you to switch to Lightning technology. Also, remember that Lightning Experience is a user experience that's for internal Salesforce users only.

If you want a site with the Lightning look and feel, create one with a template that uses Lightning technology.

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

Switch to Salesforce Classic for the following functionality.

Feature or Setting	Available with Differences	Not Available	Notes
Global header		✓	To switch between your org and Experience Cloud sites in Lightning Experience orgs, use the App Launcher.
Cloning or creating email templates as a Partner Community or Customer Community Plus user		✓	
Enabling WDC Thanks to use Mission Badges in Experience Builder sites		✓	

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

SEE ALSO:

Choosing Between Experience Builder and Salesforce Tabs + Visualforce Sites

Supported Browsers for Experience Cloud Sites

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

Browser support for Experience Cloud sites varies by the device that you access the site from and the site template.

Salesforce Tabs + Visualforce

Salesforce Tabs + Visualforce sites are supported on all desktop browsers that Salesforce supports. These sites are also accessible from the Salesforce app.

Experience Builder Sites

Experience Builder sites such as Customer Service, Partner Central, and Help Center are supported on these browsers.

Desktops and Laptops

Platforms	Apple® Safari®	Google Chrome™	Microsoft® Edge (Windows® 10 Only)	Microsoft® Internet Explorer® 11	Mozilla® Firefox®
Apple® macOS® Desktop	Supports latest stable browser version	Supports latest stable browser version	Not supported	Not supported	Supports latest stable browser version
Microsoft® Windows® Desktop	Not supported	Supports latest stable browser version	Supports latest stable browser version	Ended support on December 31, 2020	Supports latest stable browser version

Note: Support for accessing Experience Builder sites with Internet Explorer 11 ended on December 31, 2020. But there's no difference for site visitors using the browser in the short term. Because Experience Cloud no longer tests new features on Internet Explorer 11, your site can function differently than expected. To let users know they must switch browsers, make sure that the **Display warning for unsupported browsers** option is enabled in Settings.

Note: To load Experience Builder with Safari 13.1 or above, disable these settings:

- Block All Cookies
- Prevent Cross-Site Tracking
- Private Browsing
- Block Pop-ups (Pop-up blocking can prevent some pages from opening in a new tab.)

Mobile Devices

Platforms	Apple® Safari®	Google Chrome™	Microsoft® Edge (Windows® 10 only)	Microsoft® Internet Explorer® 11	Mozilla® Firefox®
Android™ Phone and Tablet	Not supported	Supports latest stable browser version	Not supported	Not supported	Not supported
iOS Phone and Tablet	Supports latest stable browser version	Not supported	Not supported	Not supported	Not supported
Windows® 8 Phone	Not supported	Not supported	Not supported	Ended support on December 31, 2020	Not supported
Windows® 10 Phone	Not supported	Not supported	Supports latest stable browser version	Not supported	Not supported

Unsupported Browser Notification

Some unsupported browsers can load the Lightning framework. When users try accessing an Experience Builder site in one of these browsers, they see a notification asking them to update or switch browsers. Other unsupported browsers such as Internet Explorer 10 or below can't load the Lightning framework. If users try accessing a site in one of these browsers, they see a blank page.

If you tested your site in an unsupported browser and everything works as expected, you can disable the default notification. From Setup, in the Quick Find box, enter `Digital Experiences Settings`, click **Settings**, and then deselect **Display warning for unsupported browsers**.

Note:

- If you used a WebView to create a mobile site, check that the pop-up window appears the way you like.
- Users don't see the unsupported browser notification on site login pages. If you know that your users are using unsupported browsers to access your site, create Visualforce login pages and use them instead of default site login pages.
- The unsupported browsers setting doesn't apply to Lightning Web Runtime (LWR) sites.

SEE ALSO:

Supported Browsers and Devices for Salesforce Classic

Supported Browsers and Devices for Lightning Experience

Access Experience Cloud Sites in the Salesforce Mobile App

Accessing Experience Cloud sites from the Salesforce mobile app depends on several factors, including the type of template used to create the site and the licenses and permissions of site users.

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Grant the Necessary Permissions

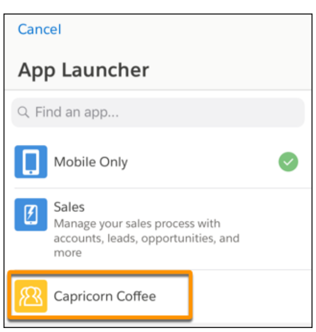
Make sure that site users can access the Salesforce mobile app.

- Verify that the mobile app is enabled for your org (default) or enable it. From Setup, enter `Settings` in the Quick Find box, then select **Salesforce Settings**.
- Allow site access via the Salesforce mobile app by granting the "API Enabled" profile permission to external users with communities licenses. From Setup, enter `Profiles` in the Quick Find box, then select **Profiles**. Select **Edit** on a profile to add the profile permission.

Salesforce Tabs + Visualforce Sites

Sites that use the Salesforce Tabs + Visualforce template are supported in the Salesforce mobile app.

Users can access sites via the mobile App Launcher. If a user is accessing a site that exists in a branded site app that's installed on the device, the site opens in that app. Otherwise, the site login page opens in the in-app browser. The user's credentials aren't passed to the browser automatically.



Type of User	How to Access a Site
Users with standard Salesforce licenses Internal org users who are also in a community	Log in to the mobile app. Use the mobile App Launcher at the top of the navigation menu and select a community.
External users with the following community licenses: • Customer Community • Customer Community Plus • Partner Community • Customer Portal • Partner Portal • High-Volume Portal User • Lightning External Apps • Lightning External Apps Plus	On the Salesforce mobile app login screen, tap . Add the site as a new connection, using the site URL for the host name: (`MyDomainName.my.site.com/<path-prefix>`). Note: If you're not using enhanced domains, your org's Experience Cloud sites URL is different. For details, see My Domain URL Formats in Salesforce Help. Then, select the site connection and log in with the site.
Unlicensed users (also known as guest users)	Not supported

Experience Builder Sites

Experience Builder sites aren't supported in the Salesforce mobile app because their styling doesn't display well. For example, if a user doesn't have permission to view a field, that field appears blank. The information in the field exists, but it isn't shown to users who don't have permission to see it.

We recommend that users access Experience Builder sites from a supported mobile browser on page 9 using the site URL.

Tip: The Salesforce mobile app isn't supported for Experience Builder sites with internal org users. If a customer has an Experience Builder site, internal users can launch it from the Salesforce mobile app using the App Launcher. The Experience Builder site opens in a web browser, not in the Salesforce mobile app.

Experience Management, Experience Workspaces, and Experience Builder

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

IN THIS SECTION:

Salesforce Mobile App Settings for Experience Cloud Sites

Easily link to Visualforce pages from other Visualforce pages in the Salesforce mobile app by selecting the checkbox under **Salesforce Mobile Settings for Experiences** in Settings.

Experience Cloud Sites: What's Different or Not Available in the Salesforce Mobile App

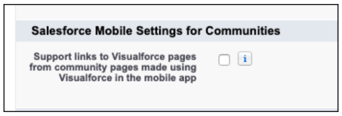
SEE ALSO:

My Domain URL Formats

Salesforce Mobile App Settings for Experience Cloud Sites

Easily link to Visualforce pages from other Visualforce pages in the Salesforce mobile app by selecting the checkbox under **Salesforce Mobile Settings for Experiences** in Settings.

Example:



Note: The setting keeps the Apex prefix in all your site URLs.

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USER PERMISSIONS

To edit Experience Cloud settings:

- Customize Application

Experience Cloud Sites: What's Different or Not Available in the Salesforce Mobile App

Experience Cloud sites in the Salesforce mobile app are similar to the Lightning Experience desktop site, with these differences:

- The navigation menu for an Experience Cloud site doesn't include all the items that are available to your internal org:
  - The navigation menu shows only the tabs that the admin has included in that site via Tabs & Pages in the site's administration settings.
  - The Events and Today items aren't available and don't appear in the navigation menu.
  - Tasks are available only to users with the Edit Tasks permission.
  - The Reports item isn't available and doesn't appear in the navigation menu.
- There's no All Company nor Company Highlights feed.
- Adding inline images to a post isn't available.
- Experience Management and Experience Workspaces aren't available.
- Site.com branding isn't supported.
- Members can't flag private messages as inappropriate.
- Reputation isn't supported. However, if reputation is enabled and set up in the desktop site, users do accrue points when using the Salesforce mobile app. Users can view their points in the desktop site only.
- Search is scoped to the Experience Cloud site and returns only items from the current site. The only exception is records, since they're shared across sites and the internal org.
- Role-based external users can approve and reject approval requests from the Approval History related list on records, but they can't submit requests for approval.
- A user's list of notifications includes notifications from all Experience Cloud sites the user is a member of. The name of the site in which the notification originated appears after the timestamp.
- External users accessing Experience Cloud sites don't see a help link.
- Photos appear next to users' names in the People list.
- The Experience Builder template and your user licenses determine how you can access Experience Cloud sites. For more information, see *Access Experience Cloud Sites in the Salesforce Mobile App* in Salesforce Help.

- Group members in Experience Cloud sites can't edit their email and in-app notification settings. As a workaround, users can set their group email notification preference to **Every Post** in the site from the desktop site. Selecting this option enables both email notifications and in-app notifications for that group.
- Push notifications for Experience Cloud sites aren't supported in the Salesforce mobile app. Their navigation and authentication behavior can vary for members with both an internal and external login or multiple external logins. We recommend that users with multiple logins access a site from a supported mobile browser using the site URL. In a mobile browser, site users receive notifications via the bell icon and notification tray.
- Direct message notifications aren't supported in mobile sites. If a user receives a direct message while using the mobile website, the bell notification doesn't display a new message.
- Experience Cloud sites aren't available when the mobile device is offline.
- The Experience Cloud site's Related List - Single component isn't supported for Files.
- The Record Headline component doesn't support Chatter actions or field labels.
- You can't create a record from a lookup field.

Experience Builder Site Limitations

Be aware of the limitations that apply to Experience Builder sites such as Customer Service and Partner Central.

General Limitations

- Lookup fields aren't supported for custom objects or in Experience Builder sites created before Spring '16.
- When Experience Builder site users save an opportunity, they're not prompted to add products, even when the **Prompt users to add products to opportunities** setting is enabled. Only users in sites built with Salesforce Tabs + Visualforce are prompted to add products.
- In multilingual sites, the login page for the site appears in the default language. To create login pages in other languages, use custom Visualforce pages.
- Google reCAPTCHA only works when access to Google web traffic is allowed. Causes for these disruptions vary, and can include network outages or government-mandated blocks. If a large percentage of your site is blocked from Google web traffic, consider requiring users to log in to post to the site.
- The Create New option for lookups isn't supported in Customer Service sites. Also, only authenticated external users (not guest users) can access asset lookup fields.
- For guest users, case validation doesn't run when cases are submitted through the Contact Support component. Validation runs once the submission is processed in the queue. Salesforce recommends writing custom client-side validation or writing custom Apex before inserting triggers to sanitize the case content.
- Partner and customer users can't be added to account teams.

Partner Sites

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

Browser Limitations

- Mobile devices using the BlackBerry or Microsoft Windows operating systems aren't supported.

- Mobile users who perform the pinch-zoom gesture on Experience Cloud site preview images will zoom into the center of the image and not a specific area of the preview image.
- Internet Explorer versions before 11 aren't supported. We've created a page that automatically lets your users know that they must either upgrade or use a newer browser.

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

  ```
  if (window.attachEvent && !window.addEventListener) {
   window.location = '<your redirect page>';
  }
  ```
- Only the latest versions of Chrome, Firefox, and Safari (on Mac OS) are supported.

Note: Customers accessing your Experience Builder sites from unsupported browsers receive a warning that site features may not work as intended and are directed to use a different or updated browser for the best experience. They can still choose, after the warning, to use the site with their current browser and reduced effectiveness, if they want. For the list of Salesforce supported browsers, see Supported Browsers for Experience Cloud Sites on page 9.

Experience Cloud Sites Usage Allocation

Experience Cloud site usage is governed by daily, monthly, and yearly allocations. Understanding these allocations is important to the success of your sites. Salesforce provides tools to help you monitor site usage so that you can avoid exceeding these allocations, or purchasing overages when needed.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

Edition	Bandwidth Allocation (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. This allocation is only calculated for non-authenticated community users."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. This allocation is only calculated for non-authenticated community users.

"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. Cached page views are also counted.

Requests that Count as Page Views

Requests for the following *are* counted as page views.

Note: If you're not using enhanced domains, your org's Experience Cloud sites URL is different. For details, see My Domain URL Formats in Salesforce Help.

Requests for...	Example
Your Experience Cloud site domain	`http://`*`MyDomainName`*`.my.site.com`
Your custom Experience Cloud site web address	`http://site.mycompany.com`

Any page associated with your Experience Cloud site	`http://`*`MyDomainName`*`.my.site.com/mypage`
	`http://`*`MyDomainName`*`.my.site.com/s/mypage`
	`http://site.mycompany.com/mypage`
	`http://site.mycompany.com/s/mypage`

Custom login pages	

Requests that Do Not Count as Page Views

Requests for the following are ***not*** counted as page views.

Note: If you're not using enhanced domains, your org's Salesforce Sites URL is different. For details, see My Domain URL Formats in Salesforce Help.

Requests for...	Example
Authorization Required error page	`http://`*`MyDomainName`*`.my.site.com/unauthorized`
AJAX requests: • JavaScript remoting • Visualforce	• Apex: RemoteAction • Visualforce: <apex:actionFunction>
Resources loaded on the page, such as `robots.txt` or the favorite icon	`http://`*`MyDomainName`*`.my.site.com/robot.txt` `http://site.mycompany.com/favicon`
Attachments and documents	
Error pages, apart from Authorization Required, such as Limit Exceeded and Maintenance	`http://`*`MyDomainName`*`.my.site.com/BandwithExceeded`
Tab clicks within a page	
Images included in an HTML field	`http://`*`MyDomainName`*`.my.site.com/servlet/rtaImage`
Custom file field	`http://`*`MyDomainName`*`.my.site.com/servlet/fileField`

Requests for...	Example
System pages associated with your Experience Cloud site, such as the login, logout confirmation, and forgot password pages	`http://site.mycompany.com/login` `https://site.mycompany.com/s/login`
API REST calls	`http://`*`MyDomainName`*`.my.site.com/Service/apexrest`

Page View Allocations

The following table lists Experience Cloud site page view allocations for each edition. This allocation applies to all the Experience Cloud sites in your org.

Edition	Maximum Number of Communities	Maximum Page Views
Enterprise Edition	100	500,000/month
Unlimited Edition Performance Edition	100	1,000,000/month

A few things to bear in mind with page view allocation:

- Your org's page view entitlement is the sum of page views included in the edition plus any additional page views purchased from Salesforce.
- Salesforce calculates page view overages by looking at a 12-month look-back period. If your site page views exceed the org allocation for page views, contact Salesforce to understand how to buy overages. Site members and unauthorized users can still access your Experience Cloud site, even if your org goes over its page view allocation.

Let's look at Acme Enterprises, which has set up a customer community. Their Enterprise Edition org includes 500,000 page views per month. Acme expects its community to take off, so they purchase another 500,000 page views per month. Their total page view entitlement is 1 million page views per month. So, over the course of a 12-month look back period, Acme's community can have 12 million page views (that's 12 x 1 million page view allocation).

The community has a spike in usage for a month, and goes over its 1 million allocation. Is Acme charged an overage? No, because the next month the community has fewer than 1 million page views. It all averages out when the calculation is made at the end of the 12-month look back period. In short, the community has to average 1 million page views per month over the course of a 12-month look back period to remain below its allocation.

Monitoring Usage

Accurately monitor your site's page view usage with the Page Views - Monthly Trend report, found in Community Management Package for Communities from the AppExchange. Install the package that is right for your communities:

- Community Management Package for Communities with Chatter
- Community Management Package for Communities without Chatter

You can also see page view usage in your org's Company Information section. In Setup, enter *`Company Information`* in the **Quick Find** box and click **Company Information**.

Note: The page view allocation found under Usage-Based Entitlement may not reflect the correct allocation for your Salesforce edition.

API Usage Allocation in Experience Cloud Sites

Communities API usage limits listed here are in addition to your Salesforce org's API limits.

	Customer Community	Customer Community Plus	Partner Community	Lightning Platform Starter	Lightning Platform Plus
API Calls per Day	0	200 per member (member-based license) 10 per member (login-based license)	200 per member (member-based license) 10 per member (login-based license)	200 per member for Enterprise Edition orgs 200 per member for Unlimited Edition orgs	1000 per member for Enterprise Edition orgs 5000 per member for Unlimited Edition orgs

SEE ALSO:

My Domain URL Formats

Set Up an Experience Cloud Site

Setting up an Experience Cloud site includes a series of tasks that you must perform in Salesforce Setup and in the site itself. From enabling digital experiences to setting up user profiles for membership and designing your site, we've got you covered!

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

Important: To better reflect the many types of connected digital experiences you can create—including portals, websites, help centers, forums, and mobile apps—Community Cloud is now called Experience Cloud.

So what's different? Terminology, for starters. Whether you're creating a forum, portal, or any other type of digital experience, at the most basic level, you're building an online site. So instead of saying *community*, which primarily connotes a forum where people interact with one another, we now use the term *site* in the user interface and documentation.

And if you accidentally enter `Community` in the Quick Find box in Setup, we automatically display the renamed Digital Experiences menu instead—we know that old habits are hard to break!

For more details on terminology changes, see the Spring '21 Release Notes.

IN THIS SECTION:

Enable Digital Experiences

Enabling digital experiences is the first step to creating an Experience Cloud site, whether you're building a community, portal, help center, or website.

Manage Your Site with Experience Workspaces

Experience Workspaces is your one-stop shop for building, setting up, and monitoring your Experience Cloud site. Access Experience Builder and Administration workspaces to manage your site's setup and branding. Community managers can view dashboards for groups, members, feed activity, and license usage, and manage the community's reputation system. Moderators can see which items have been flagged for review.

Update Org-Wide Experience Cloud Site Settings

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

Experience Cloud Site Setup Basics

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

Customize Login, Self-Registration, and Password Management for Your Experience Cloud Site

Configure the default login, logout, password management, and self-registration options for your site. Or customize the behavior with Apex and Visualforce or Experience Builder (Site.com Studio) pages. You can also use dynamic URLs to brand your pages at run time.

Deploy an Experience Cloud Site from Sandbox to Production

We recommend creating, customizing, and testing your Experience Cloud site in a test environment, such as a sandbox, before deploying it to your production org. When testing is complete, you can use change sets or Metadata API to migrate your site from one org to another. Deciding whether to use change sets or MD API depends on several factors. Some things to consider are the complexity of the changes that you're migrating, your level of comfort with developer tools, and the application lifecycle management (ALM) model that you're using.

Enable Digital Experiences

Enabling digital experiences is the first step to creating an Experience Cloud site, whether you're building a community, portal, help center, or website.

EDITIONS

Available in Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To enable digital experiences:

- Customize Application

Important: To better reflect the many types of connected digital experiences you can create—including portals, websites, help centers, forums, and mobile apps—Community Cloud is now called Experience Cloud.

So what's different? Terminology, for starters. Whether you're creating a forum, portal, or any other type of digital experience, at the most basic level, you're building an online site. So instead of saying *community*, which primarily connotes a forum where people interact with one another, we now use the term *site* in the user interface and documentation.

And if you accidentally enter `Community` in the Quick Find box in Setup, we automatically display the renamed Digital Experiences menu instead—we know that old habits are hard to break!

For more details on terminology changes, see the Spring '21 Release Notes.

Note: After you enable digital experiences, you can't disable it. If your org's access to Experience Cloud is suspended for non-payment, all your sites are deactivated, including those in Preview. When Experience Cloud is re-enabled, all sites are inactive. You can activate them, but you can't return to the Preview state.

1. From Setup, enter *`Digital Experiences`* in the Quick Find box, then select **Digital Experiences** > **Settings**.
2. Select **Enable Digital Experiences**.
3. If enhanced domains are enabled in your org, your digital experiences domain is shown. It includes your My Domain name in the format *`MyDomainName`*`.my.site.com` for production orgs.
4. If enhanced domains aren't enabled in your org, select a domain name, and click **Check Availability** to make sure that it's not already in use.

   We suggest that you use something recognizable to your users, such as your company name. The domain name is the same for all experiences. You create a unique URL for each one when creating it by entering a unique name at the end of the URL. For example, if your domain name is `UniversalTelco.my.site.com` and you're creating a customer community, you can enter *`customers`* to create the unique URL `UniversalTelco.my.site.com/customers`.

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

You can designate a custom domain by entering it in on the Domain Management page. From Setup, enter `Domains` in the Quick Find box, then select **Domains**.

5. Click **Save**.

> **Warning:** Enabling digital experiences automatically extends access to external members. Records previously accessible to Roles and Subordinates will be available to Roles, Internal and Portal Subordinates. Opening up access to site and portal subordinates could expose your org's data to external users. To secure your sites, use the Convert External User Access Wizard to help ensure that no records or folders are shared with external users. For more information, see Use the Convert External User Access Wizard.

If you've the Create and Set Up Experiences permission, you can now create experiences.

- In Experience Builder sites and Lightning Experience, the App Launcher lets members switch between their Salesforce org and experiences that they're a member of.
- In Salesforce Tabs + Visualforce sites and Salesforce Classic, the global header lets users switch between their Salesforce org and experiences that they're a member of.

SEE ALSO:

Can I use the same domain name for my Salesforce Sites and my Experience Cloud Sites?

Digital Experience Settings

Who Can See What in Communities

Enable the Global Header for Salesforce Tabs + Visualforce Sites

Enable the App Launcher in Experience Builder Sites

Manage Your Site with Experience Workspaces

Experience Workspaces is your one-stop shop for building, setting up, and monitoring your Experience Cloud site. Access Experience Builder and Administration workspaces to manage your site's setup and branding. Community managers can view dashboards for groups, members, feed activity, and license usage, and manage the community's reputation system. Moderators can see which items have been flagged for review.

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

If Experience Workspaces isn't enabled in your org, follow the steps in Access Experience Workspaces on page 23. Experience Workspaces is enabled by default for all Experience Cloud sites created after Spring '17.

Important: The options available in Experience Workspaces are based on your site template selection and preferences. That's what's happening when some options in the following list don't appear in your site. To display all sections, go to **Administration** > **Preferences**, and select **Show all settings in Experience Workspaces**.

Experience Workspaces includes the following workspaces.

Builder

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

Moderation

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

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

Content Management

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

Dashboards

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

CMS Connect

Connect your content management system (CMS) to your site. Dynamically render headers, footers, banners, CSS, JavaScript, and other CMS content on your pages.

Administration

From the Administration workspace, you can update the basic setup of your site. Configure preferences, manage membership, and select branding properties to apply. Set up reputation levels and points to reward members for activity in the feed.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To access Experience Workspaces or Experience Management:

- Access Experience Management OR Manage Experiences OR Create and Set Up Experiences
- AND is a member of the site

To access moderation rules and criteria:

- Manage Experiences OR Create and Set Up Experiences
- AND is a member of the site

To customize administration settings or use Experience Builder:

- Create and Set Up Experiences
- AND is a member of the site

Guided Setup

Configure features with Guided Setup. It walks you through setting up visibility, processes, workflows, record types, layouts, and assignment rules for Salesforce features. Each setup step gives easy-to-follow directions and navigable links to setup pages.

Important: If you're an administrator and accidentally remove yourself from a site, you can't access the Administration settings in Experience Workspaces. To add yourself back to the site or to make other membership updates, use the API.

Note: If you set clickjack protection for your site to the level for the most protection, pages in some workspaces, including Administration, appear as blank pages. To avoid this problem, use the recommended setting. If you encounter this issue, in Setup, enter `Custom URLs` in the Quick Find box, and select **Custom URLs**. Click the label for the site (not the Site.com link), and reset the clickjack protection level to the recommended setting.

IN THIS SECTION:

Access Experience Workspaces

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

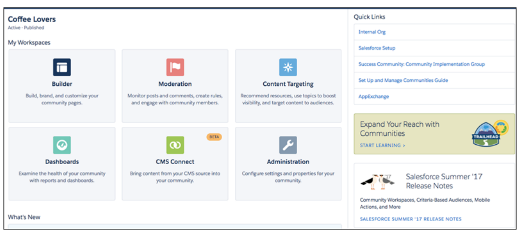
Access Experience Workspaces

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

Experience Workspaces should already be enabled in your org. In case it's not, use the following steps,.

1. From Setup, enter `Digital Experiences` in the Quick Find box, then click **Digital Experiences** > **Settings**.
2. Enable Experience Workspaces under Experience Management Settings. Click **Save**.
3. From Setup, enter `All Sites` in the Quick Find box, then click **All Sites**. To access a site workspace, click **Workspaces** next to its name.

Example:



EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To access Experience Workspaces or Experience Management:

- Access Experience Management OR Manage Experience OR Create and Set Up Experiences
- AND is a member of the site

To access moderation rules and criteria:

- Manage Experiences OR Create and Set Up Experiences

To customize administration settings or use Experience Builder:

- Create and Set Up Experiences

Update Org-Wide Experience Cloud Site Settings

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

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

IN THIS SECTION:

Set Custom Site Roles

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

Enable Super User Access for Your Site

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

Enable Report Options for External Users

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

Allow Customers to Change Case Statuses

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

Customer Portal Users

Use the Convert External User Access Wizard

When you enable digital experiences, records previously accessible to Roles and Subordinates become available to Roles, Internal and Portal Subordinates. You can use the Convert External User Access wizard to help ensure that no records or folders are shared with external users.

About High-Volume Community or Site Users

High-volume community or site users in Experience Cloud are limited-access users intended for orgs that have thousands to millions of users.

Set Up Sharing Sets

Grant Experience Cloud site users access to records using sharing sets.

Use Share Groups to Share Records Owned by High-Volume Experience Cloud Site Users

Share groups allow you to share records owned by high-volume Experience Cloud site users with authenticated internal and external users.

Digital Experience Settings

Update general settings to control access and sharing for external users in your Experience Cloud sites.

- Set the default number of roles created when a partner account is enabled
- Enable super user access for external users
- Set up sharing sets for high volume users
- Enable report options for external users
- Let customer users change case statuses
- Enable linking between Visualforce pages in an Experience Cloud site on the Salesforce mobile app

EDITIONS

Available in Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To edit settings:
- Customize Application

Set the Default Number of Site Roles

Set the default number of roles created when adding partner or customer accounts to Experience Cloud sites.

These settings apply if your community is set up with Partner Community or Customer Community Plus licenses. The limit is three roles; the system default is one. For example, if three partner roles are currently created when an account is enabled for your site–Executive, Manager, and User–but you need only the User role for new accounts, you can reduce the number to one role.

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

1. From Setup, enter `Digital Experiences` in the Quick Find box, then select **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**.

This setting does not affect the number of roles for existing accounts.

SEE ALSO:

Digital Experience Settings

Experience Cloud User Licenses

Enable Super User Access for Your Site

EDITIONS

Available in Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To set the number of default roles:

- Customize Application

Set Custom Site Roles

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

To create custom roles Experience Cloud sites:

1. From Setup, enter `Digital Experiences` in the Quick Find box, then select **All Sites**. Click **Workspaces** for the site you'd like to access.
2. Under **Administration**, click **Members**.
3. Under **Site Role**, select **Custom**.
4. Enter the new name you want to use instead of the role name. You can replace any or all of the names. You can even remove a role by deleting the role name.
5. Click **Save**.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR
- Be a member of the site AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR
- Be a member of the site AND an experience admin or publisher in that site

Enable Super User Access for Your Site

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

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

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

EDITIONS

Available in Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To enable Super User Access:
- Customize Application

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

Next, assign super user access to individual users.

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

IN THIS SECTION:

SEE ALSO:

Grant Super User Access to a Partner User
Grant Super User Access to Customer Users
Digital Experience Settings

Grant Super User Access to Customer Users

Enable super user access so that external users in your sites can access more records and data.

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

The "Portal Super User" permission lets you do the following on your accounts:

- 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 site 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.

Note: When Customer Community Plus users with the Portal Super User permission create contacts, the ownership of those contacts defaults to the channel manager associated with the user's account.

1. From Setup, enter `Permission Sets` in the `Quick Find` box, then select **Permission Sets**.
2. Either create or clone a permission set.
3. In the App Permissions section, add the "Portal Super User" permission.
4. Click **Save**.
5. Assign the permission set to your Customer Community Plus users by clicking **Manage Assignments** and then adding the appropriate users.

SEE ALSO:

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

Enable Report Options for External Users

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

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

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

EDITIONS

Available in Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To enable report options for external users:
- Customize Application

IN THIS SECTION:

Create a Report from Your Site with Report Builder

With the new Report Builder page, external users can create, edit, and delete reports directly from their Experience Cloud site.

SEE ALSO:

Digital Experience Settings

Create a Report from Your Site with Report Builder

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

With the new Report Builder page, external users can create, edit, and delete reports directly from their Experience Cloud site.

To access Report Builder and the Report run page, enable reports for your sites. You can grant partner and customer users permissions to create and edit reports through their profiles or permission sets.

User Permissions Needed	
To create permission sets or enable custom permissions in profiles:	Manage Profiles and Permission Sets
To assign a permission set to a user:	Assign Permission Sets

To let external users create and edit reports, turn on Create and Customize Reports, Report Builder, and Edit My Reports permissions through custom profiles or permission sets. If you want external users to export report data, assign them Export Reports permission.

External User Permissions Needed to Create and Edit Reports	
To create, customize, and delete reports in a personal folder:	Create and Customize Reports AND Report Builder
To create, customize and delete their own reports in a privately shared folder with Viewer access:	Edit My Reports AND Report Builder
To export report data:	Export Reports

The Report Builder page and Report Run are available in the following site templates:

- Customer Account Portal
- Partner Central
- Customer Service

External users can create, edit, and delete reports directly in their site from Report Builder.

1. Select the **Report** tab, and click **New Report**.
2. In Report Builder, create and customize your report.

After you enable reports for your community the **New Report** button, and the option to view reports using the Report run page are available. To view the **New Report** button, add the Report List page to your community. If the button doesn't appear after you enable Reports, republish your community.

With all Salesforce reports, to view, edit, or delete a report you must have access to it.

Allow Customers to Change Case Statuses

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

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

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

Customer Portal Users

> **Note:** Starting with Summer '13, the Customer Portal user license isn't available for new orgs. You can create a customer portal using the Customer Account Portal Lightning template in Experience Builder.
>
> Existing orgs using Customer Portal licenses may continue to use their licenses.

If you're still working with the Customer Portal, see the Customer Portal Guide for more information.

EDITIONS

Available in: Salesforce Classic (not available in all orgs)

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

Use the Convert External User Access Wizard

When you enable digital experiences, records previously accessible to Roles and Subordinates become available to Roles, Internal and Portal Subordinates. You can use the Convert External User Access wizard to help ensure that no records or folders are shared with external users.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To set sharing rules:
- Manage Sharing

1. From Setup, in the Quick Find box, enter `Digital Experiences`, and then select **Digital Experiences** > **Settings**.
2. Click the **Convert Site Member Access** link.
3. Select the checkboxes next to the sharing rules that you want to convert to Roles and Internal Subordinates. If there are no sharing rules to convert but you want to convert the access level for folders, proceed to the following step.
4. Click **Next**.
5. Select the checkboxes next to the folders whose access levels you want to change to Roles and Internal Subordinates.

   The wizard doesn't convert folders that are accessible to all users or accessible to public groups. You must manually update the access levels on those folders.

   A particular folder can display on multiple rows in the wizard, for example a row for each Role, Internal and Portal Subordinates category to which a folder is shared.
6. Click **Next**, then click Save to apply your changes.

The Convert External User Access Wizard doesn't convert access for these features or sharing mechanisms:

- Manual sharing
- Apex managed sharing
- Public groups
- Queues
- List views

For information on manually updating access to the Roles and Internal Subordinates category, see Considerations for the Convert External User Access Wizard.

IN THIS SECTION:

Considerations for the Convert External User Access Wizard

Keep these considerations and limitations in mind when using the Convert External User Access Wizard.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

The wizard affects the following features in your Salesforce org:

Sharing Rules

The Convert External User Access wizard can convert any owner-based or criteria-based sharing rules that include the Roles, Internal and Portal Subordinates to include the Roles and Internal Subordinates instead.

The Roles and Internal Subordinates data set category allows you to create sharing rules that include all users in a specified role plus all users in roles below that role, excluding any site roles.

> **Note:** After running the Convert External User Access wizard, you must recalculate the sharing rules to apply the changes. From Setup, in the Quick Find box, enter *`Sharing Settings`*. On each object's sharing rule section, click **Recalculate**, then click **OK**.
>
> The Roles, Internal and Portal Subordinates data set category is only available in your organization after you create at least one role in the role hierarchy.
>
> The Roles and Internal Subordinates data set category is only available in your organization after you create at least one role in the role hierarchy and enable digital experiences.

Folder Sharing

The Convert External User Access wizard also enables you to automatically convert the access levels of any report, dashboard, or document folders that are accessible to Roles, Internal and Portal Subordinates to a more restrictive access level: Roles and Internal Subordinates. This helps prevent external users from accessing folders. Using the wizard is more efficient than locating various folders in Salesforce and setting their access levels individually.

The wizard doesn't convert folders that are accessible to all users or accessible to public groups. You must manually update the access levels on those folders.

Features Not Covered by the Convert External User Access Wizard

The wizard doesn't convert access for the following features or sharing mechanisms, but you can follow these recommendations to manually secure external users' access to your org's data.

Manual Sharing

Remove Roles, Internal and Portal Subordinates from the Share With list of your manual shares, and add Roles and Internal Subordinates instead.

To identify manual shares that are shared with Roles, Internal and Portal Subordinates, use this SOQL query:

```
Select Id, UserOrGroupId from AccountShare where UserOrGroupId IN (SELECT Id FROM Group

WHERE Type = 'RoleAndSubordinates') AND RowCause = 'Manual'
```

Replace `AccountShare` with the share object that you're querying.

Apex Managed Sharing

Update your Apex code so that it creates shares to the Role and Internal Subordinates group. Because this conversion is a large-scale operation, consider using batch Apex.

Public Groups

Review public groups that contain Roles, Internal and Portal Subordinates members. Remove these members and replace with Role and Internal Subordinates as required.

To identify public groups that contain Roles, Internal and Portal Subordinates members, use this SOQL query:

```
Select Id, GroupId, UserOrGroupId from GroupMember where GroupId in (SELECT Id FROM
Group WHERE Type = 'Regular') AND UserOrGroupId in (SELECT Id FROM Group
WHERE Type = 'RoleAndSubordinates')
```

Queues

Review queues that contain Roles, Internal and Portal Subordinates members. Remove these members and replace with Role and Internal Subordinates as required.

To identify queues that contain Roles, Internal and Portal Subordinates members, use this SOQL query:

```
Select Id, GroupId, UserOrGroupId from GroupMember where GroupId in (SELECT Id FROM
Group WHERE Type = 'Queue') AND UserOrGroupId in (SELECT Id FROM Group
WHERE Type = 'RoleAndSubordinates')
```

List Views

Update list views to be shared with Role and Internal Subordinates instead of Roles, Internal and Portal Subordinates.

About High-Volume Community or Site Users

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

High-volume community or site users in Experience Cloud are limited-access users intended for orgs that have thousands to millions of users.

Unlike other users, high-volume community or site users don't have roles, which eliminates performance issues associated with role hierarchy calculations. High-volume users include the External Apps, Customer Community, High Volume Customer Portal, and Authenticated Website license types.

Characteristics

High volume users:

- Are contacts enabled to access an experience.
- Are assigned to the External Apps, Customer Community, High Volume Customer Portal, or Authenticated Website license.
- Only share the records they own with authenticated Salesforce users in sharing groups.
- Only share the records they own with unauthenticated guest users in guest user sharing rules.

Access to Records

High-volume users can access the following types of records, based on specific conditions:

- They can access their own account and contact records, based on implicit sharing.
- They have Read access on the account they belong to.
- They can access a record's parent, and the org-wide sharing setting for that record is Controlled by Parent.
- The org-wide sharing setting for the object is Public Read Only or Public Read/Write.

Admins can create sharing sets to grant high-volume users more access to records; see Set Up Sharing Sets.

Limitations

- High-volume users can't manually share records they own or have access to.
- You can't transfer cases from member-based users to high-volume users.
- High-volume users can't own accounts.
- You can't add case teams to cases owned by high-volume users.
- You can't include high-volume users in:
  - Personal groups or public groups.
  - Owner-based or criteria-based sharing rules.
  - Account teams, opportunity teams, or case teams.
  - Salesforce CRM Content libraries.

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

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

SEE ALSO:

Use Share Groups to Share Records Owned by High-Volume Experience Cloud Site Users

Set Up Sharing Sets

Grant Experience Cloud site users access to records using sharing sets.

A sharing set grants site users access to any record associated with an account or contact that matches the user's account or contact. You can also grant access to records via access mapping in a sharing set. Access mappings support indirect lookups from the user and target record to the account or contact. For example, grant site users access to all cases related to an account that's identified on the users' contact records.

Sharing sets apply across all site that a user is a member of. Record access granted to users via sharing sets isn't extended to their superiors in the role hierarchy.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To create or update sharing sets:

- Customize Application

1. From Setup, enter `Digital Experiences` in the Quick Find box, then select **Digital Experiences** > **Settings**.
2. In the Sharing Sets related list, click **New** to create a sharing set, or click **Edit** to edit 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.

   Note: You can only have one sharing set per profile.

6. Select the objects you want to grant access to.

   The following objects can be used with sharing sets:

   - Account
     - Account sharing sets can control access to Contract, Entitlement, and OrderItem objects
   - Asset
   - Campaign
   - Case
   - Contact
   - Custom Objects
   - Individual
   - Knowledge
     - Sharing for Knowledge is available only when the Knowledge standard sharing org preference is enabled.
   - Lead (contact Salesforce Customer Support to enable)
   - Opportunity

- Order
- ServiceAppointment
- Service Contract
- User
- Work Order

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

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

   If you created a user from a contact to multiple accounts, you can grant access to all records with a lookup to any accounts related to that contact. Select `Contact.RelatedAccount` 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 site users.

Note: Share groups functionality isn't available to users with Customer Community Plus and Partner Community licenses.

SEE ALSO:

Digital Experience Settings
About High-Volume Community or Site Users
Set Up Contacts to Multiple Accounts

Use Share Groups to Share Records Owned by High-Volume Experience Cloud Site Users

Share groups allow you to share records owned by high-volume Experience Cloud site users with authenticated internal and external users.

High-volume users are limited-access Experience Cloud site users, intended for orgs with many thousands to millions of external users. Because high-volume users don't have roles, performance issues associated with role hierarchy calculations are eliminated. Use a share group to share records owned by high-volume site users.

Note: You can't use share groups to share records owned by high-volume users with guest users. Instead, use guest user sharing rules. See Create Guest User Sharing Rules in Salesforce Help for more information.

Share groups apply across Experience Cloud sites and are associated with sharing sets.

Let's look at a quick video that describes how share groups work: Who Sees What in Communities: Community-Specific Sharing.

To set up share groups:

1. From Setup, enter `Settings` in the `Quick Find` box, then select **Digital Experiences** > **Settings**.
2. Click the name of the sharing set you want to associate your new share group.
3. Click the Share Group Settings tab.
4. Click **Activate** to turn on the share group.

   Activating the share group can take a while. You receive an email when the process finishes.

   Note: Deactivating a share group removes *all* other users' access to records owned by high-volume 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 org as well as external users from the same parent account as the high-volume user.
   a. From the Search dropdown, 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**.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To share records owned by high-volume Experience Cloud site users to other users:
- Customize Application

SEE ALSO:

Digital Experience Settings
About High-Volume Community or Site Users
Set Up Sharing Sets
Create Guest User Sharing Rules

Experience Cloud Site Setup Basics

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

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

IN THIS SECTION:

Sharing CRM Data in an Experience Cloud Site

Sharing CRM data in an Experience Cloud site can seem like a daunting task. You need to consider the various layers of sharing data in an internal Salesforce org, and then add the extra security layers included in a portal or community implementation. Here's a cheat sheet of all the resources you need when setting up data sharing for your Experience Cloud site.

Create Experience Cloud Site Users

To allow an external user to access your Experience Cloud site, add the user to an account as a contact record. Then enable the contact record as a customer user or partner user, depending on your business relationship.

Create an Experience Cloud Site

Create an Experience Cloud site using a wizard that helps you choose a template that meets your business needs.

Archive a Site (Closed Beta)

Archive an inactive site so that users can no longer access it.

Unarchive a Site (Closed Beta)

Unarchive an archived site so that users can access it.

Add Members to Your Experience Cloud Site

Use profiles and permission sets to manage site membership during the setup process. Adding a profile or permission to a site's membership gives access to the site to users with that profile or assigned the permission set.

Enable Notifications in Experience Builder Sites

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

Enable the App Launcher in Experience Builder Sites

Display the App Launcher in Experience Builder Sites to make it easy for members to move between their sites and their Salesforce org. This functionality is available in any site based an Experience Builder site template or Lightning Bolt solution.

Customize Salesforce Tabs + Visualforce Sites

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

Share a Link to Your Experience Cloud Site

You can allow members to preview your Experience Cloud site before making it active.

Redirect Users to Your Experience Cloud Site Pages

Redirect users to your Experience Cloud site pages from non-Salesforce pages on the same domain or within the same Experience Cloud site.

Update Your Experience Cloud Site Settings

Manage your Experience Cloud site name, description, status, and template all from one location.

Deactivate an Experience Cloud Site

You may want to deactivate an Experience Cloud site if you need to add or remove members; add, remove, or change the order of tabs; change the color scheme; or change the URL.

Enable Optional Experience Cloud Site Features

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

SEO for Experience Builder Sites

Search engine optimization (SEO) ensures that your public Experience Cloud site is visible to search engines, and helps customers, partners, and visitors find your content via online search.

Sharing CRM Data in an Experience Cloud Site

Sharing CRM data in an Experience Cloud site can seem like a daunting task. You need to consider the various layers of sharing data in an internal Salesforce org, and then add the extra security layers included in a portal or community implementation. Here's a cheat sheet of all the resources you need when setting up data sharing for your Experience Cloud site.

Before implementing your site, familiarize yourself with how Experience Clous sites coexist in a Salesforce org. Check out this video information:

- Communities and Community Users in Your Salesforce Org

Warning: Enabling digital experiences automatically extends access to external members. Records previously accessible to Roles and Subordinates will be available to Roles, Internal and Portal Subordinates. Opening up access to site and portal subordinates could expose your org's data to external users. To secure your sites, use the Convert External User Access Wizard to help ensure that no records or folders are shared with external users. For more information, see Use the Convert External User Access Wizard.

Another important concept is that the type of license your users have affects the types of sharing available to them. Based on the licenses used to access an Experience Cloud site, users have **standard** or **simple** sharing capabilities.

Standard sharing refers to all the sharing mechanisms available to internal Salesforce org users, plus various sharing mechanisms that come with Experience Cloud licenses (sharing sets, share groups, super user access). Standard sharing is available to Customer Community Plus and Partner Community licenses.

Simple sharing means that users don't have access to roles and sharing using the role hierarchy, and is normally employed in sites with a high volume of users. Simple sharing is available to Customer Community license holders. For more information about what's included in the various licenses, check out Experience Cloud User Licenses.

Resources for Sharing and Security
Org-Wide Defaults

Salesforce Org Resources
• **Video**
  – Who Sees What: Organization Wide Defaults
• **Salesforce Help**
  – Organization-Wide Sharing Defaults
• **Trailhead**
  – Module: Data Security
Experience Cloud Resources
• **Video**
  – Who Sees What in Communities: External Org-Wide Defaults

Resources for Sharing and Security

• **Salesforce Help**
  – External Organization-Wide Defaults Overview
• **Trailhead**
  – Share CRM Data with Your Partners

Account Roles and Role Hierarchies

Salesforce Org Resources
• **Video**
  – Who Sees What: Record Access via Roles
• **Salesforce Help**
  – User Role Hierarchy
• **Trailhead**
  – Module: Data Security
Experience Cloud Resources
• **Video**
  – Who Sees What in Communities: Accounts and Role Hierarchies
• **Salesforce Help**
  – Create Community Users
  – Set the Default Number of Community Roles
  – Sharing Data with Partner Users
• **Trailhead**
  – Share CRM Data with Your Partners

Sharing Rules

Salesforce Org Resources
• **Video**
  – Who Sees What: Record Access via Sharing Rules
• **Salesforce Help**
  – Sharing Rules
• **Trailhead**
  – Module: Data Security
Experience Cloud Resources
• **Video**
  – Who Sees What in Communities: Sharing Rules

Resources for Sharing and Security
• **Trailhead** – Share CRM Data with Your Partners
Sharing for Experience Cloud Sites
Resources • **Video** – Who Sees What in Communities: Community-Specific Sharing • **Salesforce Help** – Sharing Set Overview – Use Sharing Sets in Communities – Share Groups – Super User Access • **Trailhead** – Share CRM Data with Your Partners

Create Experience Cloud Site Users

USER PERMISSIONS	
To create or edit Customer Community Plus or Partner Community users:	Manage External Users Note: Avoid using the Manage User permission for the sole purpose of logging in to a site as a user as it also grants administrator access to make organizational changes.
To create or edit only Customer Community Plus users:	Manage Customer Users
To create, edit, and delete profiles:	Manage Profiles and Permission Sets
To log in as a partner or customer user:	Manage External Users OR Manage Customer Users Important: The Manage Customer Users permission is on by default for standard users created before Summer '18. AND Edit on Accounts

Note: This permission isn't needed if the person logging in has a higher role than the partner or customer user they're logging in as.

To allow an external user to access your Experience Cloud site, add the user to an account as a contact record. Then enable the contact record as a customer user or partner user, depending on your business relationship.

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

A few things to bear in mind about creating users.

- When creating any external user, the account that the new contact is associated with must have an account owner that is assigned a role in Salesforce.
- When you enable a contact as an external user, you can assign a Partner Community, Customer Community, or Customer Community Plus license to them.
- Only business accounts (and not person accounts) can be partner accounts, and you can use only partner accounts to create partner users.
- The **Log in to Site as User** button is available from the actions dropdown in Lightning communities. In Salesforce Tabs + Visualforce communities, click **Manage External User** first, to access the **Log in to Site as User** action.
- Users can only log in to sites that they're members of. To allow a user to log in using Lightning sites, make both internal and external users members of the site.
- You can only configure the **Log in to Site as User** action on the contact layout using Lightning Experience. After you enable a partner or customer user in Salesforce Classic, **Log in to Site as User** is available on the contact record, even if it's been removed from the contact layout.

1. On the account record, view or add the contact record for the person you want to add to a community.
2. On the contact detail page, click the actions dropdown and select **Enable Partner User** or **Enable Customer User**.

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

   Note:

   - To access the Manage External User button in Lightning Experience, add it to the Account and Contact page layouts. Go to **Contact** actions and add the Manage External User action to the Salesforce Mobile and Lightning Experience Actions section of the layout.
   - If you don't see the Enable Partner User or Enable Customer User buttons, ask your administrator to check the Contact page layout. If the buttons are included, ensure that your org has customer or partner community licenses available.

3. Edit the user record for this external user and assign the appropriate user license: Partner Community for partners and Customer Community or Customer Community Plus for customer users.
4. Select the appropriate profile and role for the partner or customer user.
5. If you haven't activated the site to add the external user to, deselect **Generate new password and notify user immediately** so that users don't receive a password before activation.

   - If you opt to notify the user immediately but the user isn't a member of any active site, Salesforce doesn't send the email.

- You can send a welcome email with the login information by selecting the **Send welcome email** option when you activate a site.
- If you don't send a welcome email when you activate the site, you must manually send this information to the user.

6. Click **Save**.

- Customer or partner users can't directly log in to Salesforce; they must use an Experience Cloud site to access your Salesforce data. To add a customer or partner user, add their user profiles to an Experience Cloud site.
- Customer Users don't see the Notes & Attachments related list on accounts or contacts.
- Site users can't own accounts enabled for sites.
- Creating an external user with a Customer Community Plus license is similar to creating a partner user. For Salesforce Tabs + Visualforce sites, first click **Manage External User**, and select **Enable Partner User**. For Experience Builder sites, click the actions dropdown and select **Enable Partner User**. Also, when editing the user record, clone the Partner Community User profile.
- To troubleshoot issues or ensure that the site is configured appropriately, on the contact detail page, select **Log in to Site as User**. Unless you have a higher role than the partner or customer user that you're logging in as, you must have Edit permission on Accounts to log in as a partner or customer user. A new browser window opens, and you're logged in to the community on behalf of the external user.
- When you log in as an external user, you see the behavior that the external user sees. For instance, external users see only the community dropdown menu if they have access to more than one active community. If external users have access to only one active community and they view another community in preview, the users don't see the dropdown menu in the preview community.
- When logged in as another user, an admin or support user can't authorize OAuth data access for the user. For example, if an admin logs in as another user, the admin can't authorize OAuth access for third-party applications to user accounts. This restriction includes single sign-on.

  Note: When multi-factor authentication (MFA) is enabled for a community, admins can't use the login as feature to access the community. See Set Multi-Factor Authentication Login Requirements.

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

Check out Communities and Community Users in Your Salesforce Org, a quick video about how communities live in an org, the differences between community licenses, and how Salesforce accounts and community users are associated with one another.

Take a few minutes to see how users, roles, and accounts are related in this video, titled Who Sees What in Communities: Accounts and Role Hierarchies.

With global search from your internal org, you can get uneven results when searching for a community User record. Here's why and what you can do about it. Each community has a unique network ID. When you create a community user through **Contact record** > **Create External User**, the new User record is assigned to a community's network ID.

Global search looks for records in the internal org, which has a different network ID than the community. A global search doesn't search inside communities. Since the User record is associated with a community network ID, global search doesn't return results for that record.

The workaround is to create User records in the internal org, and then associate the records to a community. You can associate an internal User record to a community by linking the internal record to a Contact record. After you forge the link, you can find the User record through global search. The User record's network ID is now associated with the internal org.

IN THIS SECTION:

Community Licenses Eligible for Upgrades

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

Communities License Limitations

Here are a few limitations related to communities licenses.

Experience Cloud Site User Account Ownership Limitations

A Salesforce user can be the owner of up to 50,000 person or business account portal users. This limit includes users with Customer Community Plus, Customer Portal, and other role-based portal licenses such as Lightning External Apps. Users with high volume portal licenses such as High Volume Customer Portal or Customer Community don't count against this limit. The limit also doesn't apply to users with legacy partner portal, Partner Community, or Lightning External Apps Plus licenses.

SEE ALSO:

Delegate External User Administration

Add Members to Your Experience Cloud Site

How do external Experience Cloud site members get login information?

Reset an External User's Password for Experience Cloud Sites

Experience Cloud User Licenses

Upgrade Community User Licenses

Partner User Roles

Customize Email Sent from Experience Cloud Sites for Email Verification

Upgrade Community User Licenses

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

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To create or edit customer users:
- Manage External Users

  OR

  Manage Customer Users

To create, edit, and delete profiles:
- "Manage Profiles and Permission Sets"

To log in as a partner or customer user:
- Manage External Users

  OR

  Manage Customer Users

  Important: The Manage Customer Users permission is on by default for standard users.

  AND

  Edit on Accounts

To allow portal users to upgrade to Partner or Customer licenses:
- Allow LitePortalUser Upgrade

Note: Community licenses are used to access Experience Cloud sites.

Before you upgrade a user's license:

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

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

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

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

5. Save your changes.

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

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

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

SEE ALSO:

Experience Cloud User Licenses

Community Licenses Eligible for Upgrades

Community Licenses Eligible for Upgrades

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

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

Note: Community licenses are used to access Experience Cloud sites.

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

- Customer Community
- External Identity (enables access to the Salesforce Customer Identity product)
- High Volume Customer Portal
- Overage High Volume Customer Portal
- Authenticated Website User Overage
- Authenticated Website User

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

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

License Conversion and Upgrade Compatibility

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

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

Original license	Convert to... Customer Community (Named User or Login Based)	Customer Community Plus (Named User or Login Based)	Partner Community (Named User or Login Based)
Partner Community	Switching from a Partner Community license to a Customer Community license would result in a loss of functionality. An admin must disable the contact as a Partner User and re-enable as a Customer User.	Switching from a Partner Community license to a Customer Community Plus license would result in a loss of functionality. An admin must disable the contact as a Partner User and re-enable as a Customer User.	An admin can convert a Partner Community license (for a named user) to a Partner Community Login license and vice versa, by changing the license type and profile on the user record.
Lightning External Apps	An admin can convert a Customer Community license (for a named user) to a Customer Community Login license and vice versa, by changing the license type and profile on user record.	An admin can change the license type and profile on the user record.	An admin can change the license type and profile on the user record.
Lightning External Apps Plus	Switching from a Partner Community license to a Customer Community license would result in a loss of functionality. An admin must disable the contact as a Partner User and re-enable as a Customer User.	Switching from a Partner Community license to a Customer Community Plus license would result in a loss of functionality. An admin must disable the contact as a Partner User and re-enable as a Customer User.	An admin can convert a Partner Community license (for a named user) to a Partner Community Login license and vice versa, by changing the license type and profile on the user record.

To upgrade users with other license types, you must deactivate them, create user identities for them, migrate their data over, and associate it with their new user records.

IN THIS SECTION:

Migrate Community Users Between Licenses

You can move community users between certain licenses using Data Loader. For example, you can migrate users between the Customer Community Member and Customer Community Login licenses. Before moving a user to another license, set up a profile for the new license type you are moving the user to.

Migrate Community Users Between Licenses

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

You can move community users between certain licenses using Data Loader. For example, you can migrate users between the Customer Community Member and Customer Community Login licenses. Before moving a user to another license, set up a profile for the new license type you are moving the user to.

Migrating users to different licenses applies to the following scenarios.

- Between the Customer or Partner Community and Customer Community Login or Partner Community Login licenses
- Between the Customer Portal or Partner Portal and Customer Community or Partner Community licenses

  Note: Making this change results in admin work and requires the creation of a new user record.

- Between the Customer Community and Customer Community Plus licenses

  Note: Make sure that you want to give Customer Community users the more advanced sharing options available to Customer Community Plus users.

Step 1: Export the User Report

1. Log in to Data Loader.
2. Click **Export**.
3. Click **Next**.
4. Select the **User (User)** object.
5. For the extraction target, enter `users.csv`.
6. Click **Next**.
7. Select the query fields **Id** and **ProfileId**.
   a. For Fields, select **IsActive**.
   b. For Operator, enter `equals`.
   c. For Value, enter `true`.
   d. Click **Add Condition**.
8. Add another condition.
   a. For Fields, select **AccountId**.
   b. For Operator, enter `not equals`.
   c. Leave Value blank.
   d. Click **Add Condition**.
9. The generated query is `Select Id, ProfileId FROM User WHERE IsActive = true AND AccountId != 'null'`.

   Note: You can copy and paste the query from this step.

10. Click **Finish**.
11. Click **Yes**.

Step 2: Query Permission Set IDs

1. In Data Loader, click **Export**.
2. Click **Next**.
3. Select **Show all Salesforce Objects**.
4. Select the **Permission Set (PermissionSet)** object.
5. For the extraction target, enter *`permissionsets.csv`*.
6. Click **Next**.
7. Choose the query fields **Label** and **Id**.
8. The generated query is `SELECT Label,Id FROM PermissionSet`.

   Note: You can copy and paste the query from this step.

9. Click **Extract**.
10. Click **OK**.

Step 3: Query the Permission Set Assignments

1. In Data Loader, click **Export**.
2. Click **Next**.
3. Select **Show all Salesforce Objects**.
4. Click **Next**.
5. Select the **Permission Set Assignments (PermissionSetAssignment)** object.
6. For the extraction target, enter *`permissionsetassignment.csv`*.
7. Click **Next**.
8. Copy the following query from this Help topic and paste it into the generated query box: `SELECT AssigneeId,Id,PermissionSetId FROM PermissionSetAssignment WHERE Assignee.UserType IN ( 'PowerPartner','PowerCustomerSuccess','CspLitePortal')`.

   Note: PowerPartner is the Partner Community license, PowerCustomerSuccess is the Customer Community Plus license, and CspLitePortal is the Customer Community license. Add or remove the licenses based on your query needs.

9. Click **Finish**.
10. Click **Yes**.

Step 4: Query Profile IDs

1. In Data Loader, click **Export**.
2. Click **Next**.
3. Select **Show all Salesforce Objects**.
4. Click **Next**.
5. Select the **Profile (Profile)** object.
6. For the extraction target, enter *`profiles.csv`*.
7. Click **Next**.

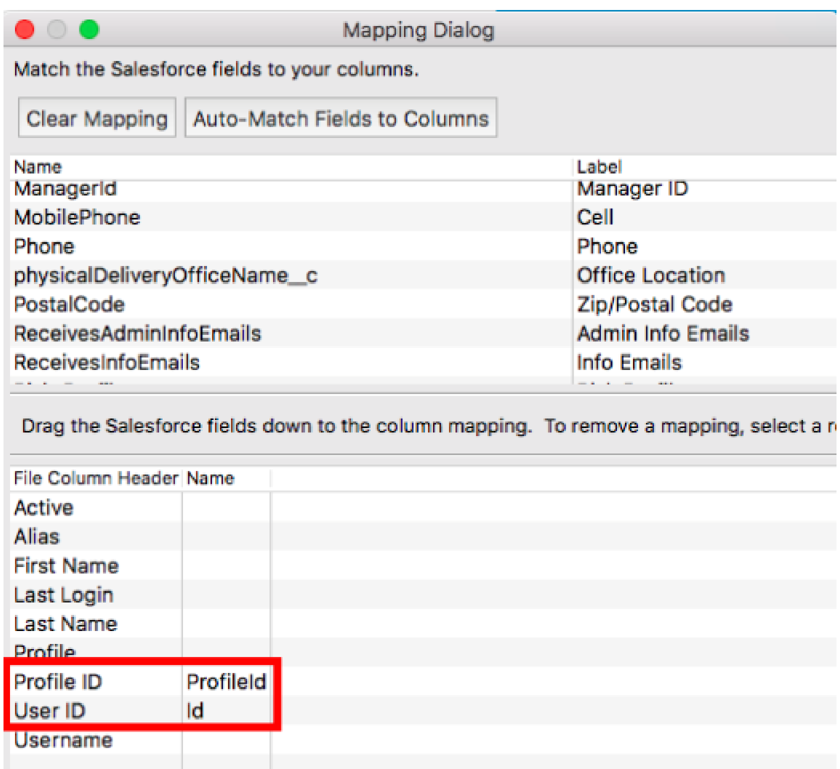
8. Copy the following query into the generated query box: `SELECT Name,UserLicense.Name,Id FROM Profile WHERE UserType IN ( 'PowerPartner','PowerCustomerSuccess','CspLitePortal')`.

   Note: PowerPartner is the Partner Community license, PowerCustomerSuccess is the Customer Community Plus license, and CspLitePortal is the Customer Community license. Add or remove the licenses based on your needs.

9. Click **Finish**.
10. Click **Yes**.

Step 5: Update User Profiles

1. Open the `users.csv` file you created.
2. Rename the ProfileID column to *`OldProfileId`*.
3. Add a column named *`ProfileID`*.
4. In the new ProfileID column, add the profile ID that you want to move the user to using the `profiles.csv` file as your guide.
5. Save the `users.csv` file.
6. Open Data Loader, and click **Update**.
7. Select the **User (User)** Salesforce object.
8. Select the **users.csv** file.
9. Click **Next**.
10. Map the ProfileId field to the Profile ID column, and map the Id field to the User ID column.



Warning: This step deletes all permission set assignments for these users. Before performing these updates, make sure that you've saved the permissions to the `permissionsetassignment.csv` file. Otherwise, you lose all history of which permission sets your site users had.

11. Click **Next**.
12. Click **Finish**.

Step 5: Insert Permission Set Assignments

1. Open the `permissionsetassignment.csv` file.
2. Rename the PermissionSetId column to *`OldPermissionSetId`*.
3. Add a column named *`PermissionSetId`*.
4. In the new PermissionSetId column, add the permission set ID that you want to move the user to using the `permissionsetassignment.csv` file as your guide.
5. Save the `permissionsetassignment.csv` file.
6. Open Data Loader, and click **Insert**.
7. Select the **Permission Set Assignment (PermissionSetAssignment)** Salesforce object.
8. Select the **permissionsetassignment.csv** file.
9. Click **Next**.
10. Map the PermissionSetId field to the PermissionSetId column, and map the Id field to the User ID column.
11. Click **Next**.
12. Click **Finish**.

Communities License Limitations

Here are a few limitations related to communities licenses.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

- Note: Community licenses are used to access Experience Cloud sites.
- There are different requirements for username uniqueness depending on the type of license your community is using. Customer Community, Customer Community Plus, and External Identity licenses require unique usernames within the Salesforce org that an Experience Cloud site belongs to. Employee Community licenses require unique usernames across all Salesforce orgs that the user belongs to.
- A user with a Partner Community license must be associated with a business account that is enabled as a partner account. Partner users can't be associated with person accounts.

  Partner Community licenses don't require a unique username, which leaves the username uniqueness requirement up to you. Check out Set Partner Username Uniqueness Requirement to the Org Level on page 832 to configure.
- Users with community and portal licenses can't create or update email templates.
- Customer Community licenses support sharing sets, but not sharing rules. And currently, sharing sets don't support objects that are associated with multiple other objects of the same type. To use such features, your community members must have the Customer Community Plus or Partner Community license. With that said, sharing set support for the Contacts to Multiple Accounts feature is available as a pilot feature.

- Customer users with the following licenses can't update case statuses in communities built on the Salesforce Tabs + Visualforce template on desktop browsers.
  - Customer Community
  - High Volume Portal User
  - Customer Portal
- Users with the Partner Community license can't access the Quotes tab in Experience Cloud sites using the Salesforce Tabs + Visualforce template. They can view, modify, and update quotes according to their permissions from other locations in the UI, such as from opportunities.
- The **Enable notifications for sites** permission is read-only and cannot be changed for Partner Community profiles.

Experience Cloud Site User Account Ownership Limitations

A Salesforce user can be the owner of up to 50,000 person or business account portal users. This limit includes users with Customer Community Plus, Customer Portal, and other role-based portal licenses such as Lightning External Apps. Users with high volume portal licenses such as High Volume Customer Portal or Customer Community don't count against this limit. The limit also doesn't apply to users with legacy partner portal, Partner Community, or Lightning External Apps Plus licenses.

You can't merge person accounts that are enabled to use portal or Experience Cloud site users.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

Create an Experience Cloud Site

Create an Experience Cloud site using a wizard that helps you choose a template that meets your business needs.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To create an Experience Cloud site:

- Create and Set Up Experiences AND View Setup and Configuration

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

> **Important:** To better reflect the many types of connected digital experiences you can create—including portals, websites, help centers, forums, and mobile apps—Community Cloud is now called Experience Cloud.
>
> So what's different? Terminology, for starters. Whether you're creating a forum, portal, or any other type of digital experience, at the most basic level, you're building an online site. So instead of saying *community*, which primarily connotes a forum where people interact with one another, we now use the term *site* in the user interface and documentation.
>
> And if you accidentally enter `Community` in the Quick Find box in Setup, we automatically display the renamed Digital Experiences menu instead—we know that old habits are hard to break!
>
> For more details on terminology changes, see the Spring '21 Release Notes.

To see the number of sites you can create for your org, from Setup, enter `Digital Experiences` in the Quick Find box, and select **Sites**. The maximum number of sites appears at the top of the page.

1. To create a site, from Setup, enter `Digital Experiences` in the Quick Find box, select **Sites**, and then click **New Site**.
   The creation wizard opens with several templates for you to choose from. If you have Lightning Bolt solutions available in your org, they are listed in the wizard.
2. To see more information about a template, select it.

   Customer Account Portal
   A private and secure place for customers to access and update their account information. Improve customer relationships and decrease service costs by letting customers work in the portal. Customers can see and pay invoices, update their account information, and search your knowledge base for answers to their most frequent questions.

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

   Customer Service
   A powerful, responsive self-service template with multiple prebuilt theme options. The Customer Service template lets users post questions to the community, search for and view articles, collaborate, and contact support agents by creating cases. Supports Knowledge, Chatter Questions, and cases.

   Help Center
   A public-access, self-service community that exposes the articles that you make available from your knowledge base. You reduce the load on your customer support team, and your users get the satisfaction of finding their own solutions.

Build Your Own (Aura)

Provides the basic pages that every Experience Builder site needs: Home, Create Record, Error, Record Detail, Record List, Related Record List, Search, Check Password, Forgot Password, Login, Login Error, and Register. Add more pages and components as needed for the experience you're building. To refine the look of your site, customize your branding and themes.

Build Your Own (LWR)

Powered by the new Lightning Web Runtime (LWR) platform, this customizable template delivers unparalleled page performance and improves developer productivity. Quickly build pixel-perfect pages and develop Lightning web components and themes to match your unique brand.

Suitable for developers, consulting partners, and ISVs who are familiar with developing custom Lightning web components, and working with Salesforce DX, User Interface API, and Apex. See the LWR Sites for Experience Cloud guide.

Aloha

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

Salesforce Tabs + Visualforce

Standard Salesforce structure and tabs that you can customize using Visualforce. Requires developer experience and advanced setup skills. Allows full platform access with a flexible configuration and supports most standard objects, custom objects, and the Salesforce mobile app.

Salesforce Tabs + Visualforce isn't a Lightning-based template and therefore doesn't work with Experience Builder.

Note: As part of their phased retirement, from Summer '17, you can no longer use the Koa and Kokua templates. Salesforce still supports existing Experience Builder sites that were built using Koa and Kokua. To create a site based on Koa or Kokua, contact Salesforce Support. However, we recommend that you work with Salesforce Support on a plan to replace your existing Koa and Kokua sites. The latest Experience Builder templates provide richer support for Knowledge and case management.

3. Select the template that you want to use.
4. Read the template description and key features, and click **Get Started**.
5. Enter a name.
6. For URL, enter the name of your site.

   This name is appended to the domain that you created when you enabled digital experiences for this org. For example, if your domain name is `UniversalTelco.my.site.com` and you're creating a customer community, you can enter *`customers`* to create the unique URL `UniversalTelco.my.site.com/customers`.

   Note: You can create one site that doesn't have a custom URL.

   You can change your site name and URL after the site is activated, but users aren't redirected to the new URL. So be sure to inform your members before changing the name or URL.

7. Click **Create**.
   The site is created in Preview status. Now you're ready to build and customize or manage and moderate your site.

When you create a site, Salesforce supplies default pages for login, self-registration, change password, forgot password, and your home page. These pages are based on which template you use to create your site. You can customize these default pages at any time in the Login & Registration page of the Administration workspace.

Important: After you create a site, your profile is added to the list of profiles that have access to it. Then all users with this profile can log in to the site after it's active. If you don't want all users with your profile to have access to the site, remove the profile, and give yourself access through a different profile or permission set. Then create a profile specifically for your site users.

IN THIS SECTION:

SEE ALSO:

Set Up and Manage Experience Cloud Sites

How Many Experience Cloud Sites Can My Org Have?

Edit Pages and Components in Experience Builder

Implementation Guide: Getting Started with the Aloha Community Template for Salesforce Identity

How Many Experience Cloud Sites Can My Org Have?

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

You can have up to 100 Experience Cloud sites in your Salesforce org. Active, inactive, and preview sites, including Lightning Platform sites, count against this limit.

To see this limit in your org, from Setup enter *`Digital Experiences`* in the `Quick Find` box, then select **All Sites**. The `Maximum number of sites (including active, inactive, and preview)` field displays 100.

SEE ALSO:

Create an Experience Cloud Site

Archive a Site (Closed Beta)

EDITIONS

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

You must have at least one active community license in your org to use this feature.

USER PERMISSIONS

To archive an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

Archive an inactive site so that users can no longer access it.

Note: Archive Sites is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at Agreements and Terms.

Contact Salesforce Support to enable the Archive a Site feature in your org.

1. Access Salesforce CMS using the App Launcher.
2. Note: To update visibility and tab settings for profiles you'd like to have access to Salesforce CMS and the All Experiences page, see Start Using Salesforce CMS.

   Click **View All** in All Experiences.
3. Click the name of the site you'd like to archive.
4. On the site detail page, click **Archive**.
5. Click **Archive** again.

Your site is archived. If you change your mind, you can unarchive it.

IN THIS SECTION:

Considerations for Archiving a Site (Closed Beta)

Before you archive a site, consider what types of sites can be archived, and the impact that archiving might have on users.

> Note: Archive Sites is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at Agreements and Terms.

- You can only archive inactive sites. If your site is in Preview, you must activate and then deactivate the site before archiving it.
- When you archive a site,
  - The site's URL is unavailable to all users, including admins.
  - Instead of the site, users see a Site under maintenance page.
  - You can't access the site's Experience Builder or Workspaces.
  - The site doesn't count against your org's maximum 100 unarchived site limit.

EDITIONS

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

You must have at least one active community license in your org to use this feature.

Unarchive a Site (Closed Beta)

Unarchive an archived site so that users can access it.

> Note: Archive Sites is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at Agreements and Terms.

Contact Salesforce Support to enable the Archive a Site feature in your org.

1. Access Salesforce CMS using the App Launcher.
2. > Note: To update visibility and tab settings for profiles you'd like to have access to Salesforce CMS and the All Experiences page, see Start Using Salesforce CMS.

   Click **View All** in All Experiences.
3. Click the name of the site you'd like to unarchive.
4. On the site detail page, click **Unarchive**.
5. Click **Unarchive** again.

Your site is archived. If you change your mind, you can unarchive it.

EDITIONS

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

You must have at least one active community license in your org to use this feature.

USER PERMISSIONS

To unarchive an Experience Cloud site:

- Create and Set Up Experiences

Add Members to Your Experience Cloud Site

Use profiles and permission sets to manage site membership during the setup process. Adding a profile or permission to a site's membership gives access to the site to users with that profile or assigned the permission set.

Add a profile or permission set to a site's membership. Using profiles and permission sets, you can:

- Grant or remove access for groups of users. After you add a profile or permission set, all users assigned to that profile or permission set become members of the site.
- Enforce a membership policy. New users added to a profile or permission set that is already associated with a site automatically gain access.

Note:
- If you add a permission to a permission set that is being used to grant membership to a site, the site members also get access to the permissions unrelated to site membership. Salesforce recommends checking if a permission set is used in any site's membership list before adding new permissions to it.
- You can't use permission set groups to add membership to a site, only permission sets.

Permission sets allow added flexibility for adding members. You can grant site access to a subset of users from the same profile, without needing to clone the profile.

You can add Standard, Chatter, and partner profiles to sites. Chatter customers, from private groups with customers, can't be added to sites even if they're assigned permission sets that are associated with sites.

Note: Profiles and permission sets associated with sites can't be deleted from Salesforce. Remove the profiles or permission sets from the sites first.

1. Open Experience Workspaces.
2. Click **Administration** > **Members**.
3. To add members using profiles:
   a. To filter profiles, select a profile type from the dropdown 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 site.

   b. Select the user profiles you want to allow access to your site. To select multiple profiles, press CTRL.
   c. Click **Add**. To remove a profile, select it and click **Remove**.

      If you remove a profile from a site, users with that profile lose access to the site, unless the users are assigned permission sets or other profiles that are still part of the site. Their posts and comments still appear.

      Important: If you're an admin and accidentally remove yourself from a site, you can't access the Administration settings in Experience Management or Experience Workspaces. To add yourself back to the site or make other membership updates, use the API.

4. To add members using permission sets:

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To create an Experience Cloud site:
- Create and Set Up Experiences AND View Setup and Configuration

To customize an Experience Cloud site:
- Be a member of the site AND Create and Set Up Experiences

  OR
- Be a member of the site AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:
- Be a member of the site AND Create and Set Up Experiences

  OR
- Be a member of the site AND an experience admin or publisher in that site

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 site. To select multiple permission sets, press CTRL.
c. Click **Add**.

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

5. Click **Save**.

   If the site 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's sent to an external user who hasn't logged in to a site yet.

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

There are other options for granting access to your site:

- 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 site without creating an account

For more information about these additional options, see Customize Login, Self-Registration, and Password Management for Your Experience Cloud Site.

With global search from your internal org, you can get uneven results when searching for a site User record. Here's why and what you can do about it. Each site has a unique network ID. When you create a site user through **Contact record** > **Create External User**, the new User record is assigned to a site's network ID.

Global search looks for records in the internal org, which has a different network ID than the site. A global search doesn't search inside sites. Since the User record is associated with a site network ID, global search doesn't return results for that record.

The workaround is to create User records in the internal org, and then associate the records to a site. You can associate an internal User record to a site by linking the internal record to a Contact record. After you forge the link, you can find the User record through global search. The User record's network ID is now associated with the internal org.

IN THIS SECTION:

Membership Processing Best Practices

Processing membership when many members are added in a single transaction can result in significant lockout times. Limiting the number of users per transaction can speed up processing time. Follow these best practices to minimize the impact of processing times on members.

Reset an External User's Password for Experience Cloud Sites

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

How do external Experience Cloud site members get login information?

External users get their login credentials in welcome emails from an Experience Cloud site.

How do I update Experience Cloud site membership using the API?

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

SEE ALSO:

Customize Salesforce Tabs + Visualforce Sites
Enable the Global Header for Salesforce Tabs + Visualforce Sites

Membership Processing Best Practices

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

Processing membership when many members are added in a single transaction can result in significant lockout times. Limiting the number of users per transaction can speed up processing time. Follow these best practices to minimize the impact of processing times on members.

Plan Ahead of the Go Live Date

A few things to keep in mind when planning to add or remove members to a site or portal:

- The number of members that are added or removed affects the processing time. The more members that are processed, the more time it takes to complete the process. When processing over a million users, the processing time can take hours.

  Note: Governor limits ensure that only 10 million users are processed at a time. Attempting to process more than 10 million at a time results in an error.

- When processing members, the site or portal is locked and admins can't make more changes to it. New Experience Cloud site members aren't able to access the site until processing is complete, but existing members still have access. Plan for a maintenance window and communicate as necessary with your members.
- To get an approximate estimate of the processing time, test the deployment in a sandbox environment with a similar setup before deploying in production.
- Schedule membership updates for a time when traffic in the site is known to be low.

Organize Members into Smaller Groups

Organizing members into smaller groups cuts down on processing time. The following strategies can help reduce the number of members being processed at a time:

- Membership processing adds both active and inactive members of a profile or permission set to the portal or site. Remove inactive members from profiles and permission sets if you don't need to track them.
- Go live with high-priority members first. Then add the rest of the group in order of priority.
- Add profiles and permission sets in small batches. For example, if you're adding 10 million members, put them into buckets of 1 million per profile or permission set.
- Removing profiles or permission sets from the portal or site takes longer than adding them. Make sure that those profiles or permission sets are required before you add them so you don't have to remove them later.

Other Considerations

When processing members:

- Don't add and remove profiles or permission sets at the same time.
- Don't add or remove users from profiles or permission sets while membership is processing.
- Don't allow user self-registration while membership is processing.

Contact Salesforce Customer Support for further assistance.

Reset an External User's Password for Experience Cloud Sites

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

In either case, when someone initiates a reset of an external user's password, an email is sent to the user with a link to reset the password. Password reset links expire after 24 hours. When users click the link, they're required to reset their password before proceeding.

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

SEE ALSO:

Create Experience Cloud Site Users

How do external Experience Cloud site members get login information?

How do external Experience Cloud site members get login information?

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

External users get their login credentials in welcome emails from an Experience Cloud site.

When you enable a contact as a customer user or partner user, they don't receive their login credentials until you add them to an Experience Cloud site with welcome emails enabled. If welcome emails are disabled for the site, the external user doesn't receive credentials, and you must manually send them. To do so, from Setup, enter *`Users`* in the Quick Find box, select **Users**, select the checkbox next to the user's name, and then click **Reset Password**. An email containing the user's username and a link to reset the password is sent to the user. The link in this email expires after 24 hours.

SEE ALSO:

Create Experience Cloud Site Users

Reset an External User's Password for Experience Cloud Sites

How do I update Experience Cloud site membership using the API?

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

Tip: You can also use other data loaders to update your Experience cloud site membership.

1. Get the `networkId` for your Experience Cloud site.

   From Setup, enter *`Digital Experiences`* in the `Quick Find` box, select **All Sites**, and then right-click your Experience Cloud site URL and select **Inspect**. The `data-networkId` property provides your `networkId`.

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

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

   For example, at *`ExperienceCloudSitesSubdomainName.my.site.com/00aa11bb22`*, the ID is *`00aa11bb22`*.

   Note: If you're not using enhanced domains, your org's Experience Cloud sites URL is different. For details, see My Domain URL Formats in Salesforce Help.

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 can access Experience Workspaces from the **Workspaces** link on the **All Sites** page in Setup.

Note: In order to access Experience Workspaces, the member must also have Create and Set Up Experiences or Manage Experiences permission.

SEE ALSO:

Insert, Update, or Delete Data Using Data Loader

My Domain URL Formats

Customize Email Sent from Experience Cloud Sites for Email Verification

You can customize email sender information and Chatter email branding. You can also customize email templates, such as templates for welcoming new members and resetting members' passwords. Customize email templates in the user interface or with Visualforce.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

1. From Setup, enter `All` in the Quick Find box, and select **All Experiences**. Next to your site, click **Workspaces**.
2. Click **Administration**, and then select **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 value for verification.

   If you enter a custom value for the sender's address and you have enabled mail relay, your Chatter emails 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 org'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. To replace the default Chatter logo, choose a logo.

      The logo must be an existing document in the Documents tab and must be marked Externally Available Image. Images of 150 x 50 pixels on a transparent background work best.

   b. To replace the default footer text, enter up to 1,000 characters.

      The default text includes the Salesforce name and physical address. We recommend including your org's physical address to comply with applicable anti-spam laws.

5. To send email to users when they're added to the site, select **Send welcome email**.

   Important: Welcome emails contain login information for external members. If you don't select this option, you must send username and password information directly to the user who's registering for your site.

   Salesforce sends welcome emails when:

   - A site changes from Preview status to Active status. An inactive site doesn't receive emails unless the associated org has a default portal or if the user's profile is part of an active portal.
   - An admin adds a profile or permission set to an active site.
   - A user of an active site is assigned a profile or permission set.

   You can set the duration that the link provided in the welcome email is valid.

   a. From Setup, enter `Session` in the Quick Find box, then click **Session Settings**.

b. From the dropdown menu, select **Link Expires In**, and select the duration.

Note: If a profile or permission set is part of multiple sites, users with that profile or permission set receive a welcome email from each site. The first email contains login credentials, but emails from subsequent sites simply contain a link to the site.

6. To send email to users when they receive a one-time password, for One-Time Password, look up and select the email template, `Communities: One-Time Password Email`.

   Important: This one-time password email message isn't enabled by default. If you don't select this option, Salesforce sends a generic message for identity verification.

   Salesforce sends verification emails whenever users are required to confirm their identity.

   - An external user attempts to log in to your site with an email address.
   - An external user attempts to register a mobile or U2F device.
   - An external user changes their email address.

   Salesforce also sends emails with one-time passwords for device activation when users log in from an unfamiliar browser, app, or IP address. This use case isn't covered by the One-Time Password email template. To customize emails sent for device activation, use the Device Activation Verification email template.

7. To select an email template for Forgot Password, Change Password, Case Comment, User Lockout, One-Time Password emails, Device Activation Verification emails, User Verification Email, or Change Email Address Verification, click . Then select an email template from the list.

   Password reset links expire after 24 hours.

   You can customize the default email templates.

   Note: When you customize the contents of a default email template, use the `{!Community_Url}` merge field to populate the URL for the current site. This field ensures that emails have the correct URL to direct users to the appropriate site. The `{!Community_url}` merge field isn't available for the User Lockout template.

8. Click **Save**.

Emails that are sent as a result of approvals and workflows, and changes to unscoped objects, like cases, are sent based on site membership. For example, if a workflow triggers an email, all the recipients are grouped based on site membership and then one email is sent to each group. If the user is a member of multiple active sites, the email comes from the oldest active site.

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

Another way to customize site 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 users that their password has been reset.
- `ChgEmailVerNewEmailTemplateId`—ID of the email template used when notifying users that their email address has been changed. This template is sent to the new email address.
- `ChgEmailVerOldEmailTemplateId`—ID of the email template used when notifying users that their email address has been changed. This template is sent to the old email address.
- `DeviceActEmailTemplateId`—ID of the email template used when users log in from an unrecognized browser, app, or IP address. The email contains a one-time password that users enter to verify their identity.
- `EmailFooterLogoId`—ID of the Document object that displays as an image in the footer of site Chatter emails.
- `EmailFooterText`—Text that displays in the footer of site Chatter emails.

- `EmailSenderAddress`—Read only. Email address from which site emails are sent.
- `EmailSenderName`—Name from which site emails are sent.
- `ForgotPasswordEmailTemplateId`—ID of the email template used when users forget their password.
- `LockoutEmailTemplateId`—ID of the email template used when users try to reset their password after locking themselves out of their site from too many login attempts.
- `NewSenderAddress`—Email address that has been entered as the new value for `EmailSenderAddress` but hasn't 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 value becomes the email address from which site emails are sent.
  - If verification is pending for a new email address and you set `NewSenderAddress` to null, the verification request is canceled.
  - `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 site.
- `VerificationEmailTemplateId`—ID of the email template used when users must verify their identity, for example, when they log in without a password or from a new device.
- `WelcomeEmailTemplateId`—ID of the email template used when sending welcome emails to new site members.

SEE ALSO:

Merge Fields for Experience Cloud Sites
Customize Salesforce Tabs + Visualforce Sites
Add Send an Email, Log a Call, New Event, and New Task Buttons to the Activity Composer
Use Your Classic Email Templates in Lightning Experience

Merge Fields for Experience Cloud Sites

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

You can personalize the email that you send to Experience Cloud site members by adding merge fields to your email templates.

When you enable digital experiences in your org, Salesforce provides text-based email templates to simplify communicating with your Experience Cloud site members. You can use these templates to:

- Welcome new members
- Handle forgotten passwords
- Reset passwords
- Notify users when they're locked out after failing to log in after so many attempts
- Comment on cases
- Send one-time passwords when identity verification is required for multi-factor authentication or passwordless login
- Send one-time passwords when identity verification is required for device activation
- Send verification links in asnyc email messages for identity verification
- Send verification emails when a user changes their email address

Experience Cloud site email templates have merge fields unique to sites. You can find them under the Network Member Fields field type. You can also use other merge field types, such as Receiving User and Organization. Here are a few merge fields commonly used in Experience Cloud site email templates.

Field Name	Description

`{!Network_Community_Name}`
OR
`{!Community.Name}`
OR
`{!Community_Name}`
	The name of the Experience Cloud site.

`{!Network_Community_Url}`
OR
`{!Community.Url}`
OR
`{!Community_Url}`
	The URL to the login page of the Experience Cloud site, for example, `https://`*`MyDomainName`*`.my.site.com/partners/login`.
	{!Community_Url} is populated in the:
	• Welcome New Member template when **Send welcome email** is selected
	• Forgot Password or Change Password template if the external user receiving the email is a member of the Experience Cloud site

`{!Receiving_User.Username}`	The username of the user receiving the email. This field only renders for mass emails.

`{!NetworkMember.Operating_System}`
OR
`{!Operating_System}`
	The operating system of the Experience Cloud site member.

`{!NetworkMember.EmailVerify_Url}`
OR
`{!EmailVerify_Url}`
	The verification link sent a user via email.

`{!ChgEmailVer.NewEmail}`
OR
`{!ChgEmailVer.OldEmail}`
	The user's email address.

`{!ChgEmailVer.URL}`	The verification link sent a user via email when their email address is changed.

Note: Available merge fields differ between email templates. View Available Merge Fields at the top of each email template to see the available fields.

For more flexibility, you can create custom Experience Cloud site email templates in Visualforce. For a Visualforce email template, use the `$Network` global merge field type and its properties, as described in this table. These fields are populated only in Visualforce Experience Cloud site email templates.

Field Name	Description
`$Network.ActionForVerificationEmail`	Used in one-time password (OTP) and device activation emails to specify the action that prompted sending a verification email.
`$Network.AsyncVerificationLink`	Used in asynchronous emails to send a verification link (URL) to users. Users click the link to verify their email address with Salesforce. After verifying their email address, external users can log in with a one-time password (OTP) via email (passwordless login).
`$Network.BrowserForVerificationEmail`	Used in OTP and device activation emails to specify the browser where the action occurred that prompted sending a verification email.
`$Network.CodeForVerificationEmail`	The verification code sent in the OTP or device activation email.
`$Network.ChgEmailVerOldEmail`	The user's old email address, when they change it.
`$Network.ChgEmailVerNewEmail`	The user's new email address, when they change it.
`$Network.ChgEmailVerLink`	The link, sent to the user's new email address, that the user follows to verify their email address change.
`$Network.Name`	The name of the Experience Cloud site.
`$Network.NetworkUrlForUserEmails`	The URL to the login page of the Experience Cloud site, for example, `https://MyDomainName.my.site.com/partners/login`. If this merge field is in the welcome email to new members, the URL is appended with a link to a reset password page.
`$Network.OperatingSystemForVerificationEmail`	Used in OTP and device activation emails to specify the operating system where the action occurred that prompted sending a verification email.

`$Network.passwordLockTime`
OR
`{!PASSWORD_LOCK_TIME}`
	Used in the formula field for lockout emails to specify how long a user must wait until logging in again after being locked out.

For more information on creating Visualforce templates, see the Visualforce Developer Guide.

If your Experience Cloud site uses cases, approvals, or workflows, emails created from an email template that use the `{!<any_object>.Link}` or `{!Case.Link}` merge fields include a link to the record in the site. If the user receiving the email is a member of multiple active Experience Cloud sites, the link goes to the oldest active site. If the user is already logged in to a site and clicks the link in the email, the link goes to that site. If the user isn't a member of any site, the link goes to the internal org. If the user is a member of a portal and a site, the link goes to the site.

Field Name	Description
`{!Case.Link}`	Used in: • Case comment notifications to contacts and owners

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

To insert merge fields into your Experience Cloud site email templates,

1. From Setup, enter *Email Templates* in the Quick Find box, and select **Classic Email Templates**. Next to an email template, click **Edit**.
2. Under Available Merge Fields, from the dropdown menu, select the field type, and then select the field. For merge fields specific to sites, select **Network Member Fields**.
3. Copy the merge field value into the body of the email template.

SEE ALSO:

Customize Email Sent from Experience Cloud Sites for Email Verification
Email Templates in Salesforce Classic

Customize the One-Time Password Email Template

You can customize the email that you send to external users to verify their identity with a one-time password (OTP). The email includes a verification code that users enter to prove their identity. Control how you communicate with your customers and partners by rewording the email that comes with the verification code.

Salesforce sends out an email with an OTP for email verifications in these scenarios.

- Passwordless login—Set up a login page for your site that allows users to log in with their email address. You create a passwordless login page from your site's Login & Registration page. See Customize Your Experience Cloud Site's Login Experience.
- Multi-factor authentication—Require users to log in with multi-factor authentication (MFA).

Salesforce also sends an email with a one-time password for device activation email verifications. To customize this notification, see Device Activation Email Template.

The one-time password email template is available to Experience Builder sites as of Winter '19.

1. From Setup, enter `All` in the Quick Find box, and select **All Experiences**. Next to your site, click **Workspaces**.
2. Select **Administration**, and then select **Emails**.
3. Under Email Templates, click next to One-Time Password, and select **Experiences: One-Time Password Email**.
4. Click **Save**.

   Your site is set up to send verification code notifications to users.

5. To customize the notification, edit the email template.
   a. From Setup, enter `Email Templates` in the Quick Find box, and select **Classic Email Templates**.
   b. Next to Experiences: One-Time Password Email, select **Edit**.
   c. Edit the text in the email body.

      Note: Don't remove `{!Verification_Code}`.

   d. (Optional) In the email body, insert merge fields listed under Available Merge Field. To get the merge field value, select a field type, and then select a field. Copy and paste the merge field value into the email body.

      For example, from the Field Type dropdown, select **Network Member Fields**, and then select **Site Name**. The Merge Field Value displays `{!Community.Name}`.

   e. Click **Save**.

You can also use Visualforce to create a custom OTP email template using the `$Network` global merge field type. See Merge Fields for Experience Cloud Sites.

EDITIONS

Available in: Experience Builder sites

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

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

Customize the Device Activation Email Template

Customize the email you send to verify a user's identity when they access your Experience Cloud site from an unfamiliar browser, application, or IP address. The email includes a one-time password (OTP) that users enter to verify their identity. Change the look and wording of the email to match your brand.

Device activation works differently based on whether you've configured a trusted IP address range. If you haven't defined a trusted IP range, users are prompted to verify their identity when they log in from a new browser or app. If you have defined a trusted IP range, users must verify their identity when they log in from an IP address outside of the range. For more information on how device activation works, see Device Activation.

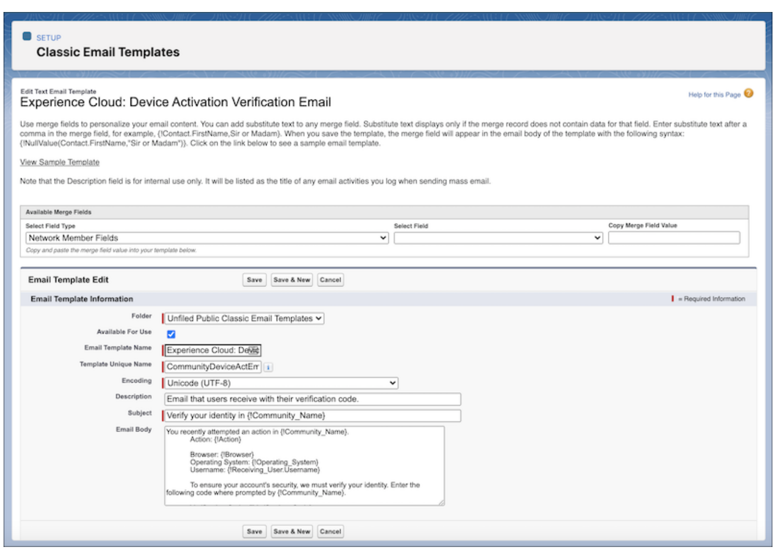
You can enable device activation for Experience Cloud site users through Profiles in Session Settings.

1. From Setup, in the Quick Find box, enter `Sites`, and then select **All Sites**.
2. Next to your site, click **Workspaces**.
3. Select **Administration**, and then select **Emails**.
4. Under Email Templates, click next to Device Activation Verification, and select **Experience Cloud: Device Activation Verification Email**.
5. Save your settings.
   Your site is set up to send device activation notifications to users.
6. To customize the notification, edit the email template.
   a. From Setup, in the Quick Find box, enter `Email Templates`, and then select **Classic Email Templates**.
   b. Next to Experience Cloud: Device Activation Verification Email, click **Edit**.
   c. Edit the text in the email body.

   Note: Don't remove `{!Verification_Code}`.

   a. Optionally, to personalize the text, use the available merge fields listed at the top of the page. For more information, see Merge Fields for Experience Cloud Sites.

Example:



EDITIONS

Available in: Experience Builder sites

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

USER PERMISSIONS

To create an Experience Cloud site:

- Create and Set Up Experiences AND View Setup and Configuration

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

Hide Unneeded Visualforce Pages on Your Experience Cloud Site

To avoid exposing pages that don't reflect your brand or that allow for alternative ways to log in to your site, be aware of these guidelines when configuring Visualforce pages that are part of your Experience Cloud site. Understand the relationship between Experience Cloud sites and Salesforce Sites, their public Visualforce pages, and steps to take for a proper configuration.

Relationship Between Experience Cloud Sites and Salesforce Sites

When you create an Experience Cloud site, Salesforce creates a Salesforce Site. Salesforce Site technology powers some of the underlying features behind Experience Cloud sites.

For example, some security settings are set at the Salesforce Site level. Salesforce Sites also automatically create and exposes a set of default Visualforce pages. Before you set up an Experience Cloud site, review the settings of the associated Salesforce Site. To get the full picture of what is visible after creating an Experience Cloud site, review the Experience Builder pages and the accompanying Site Visualforce pages.

If you already have a live Experience Cloud site, run a check to see which pages are visible. One of the default Visualforce pages is named `SiteLogin`. To check if your site exposes this page, append `/SiteLogin` after your Experience Cloud site domain (without the `/s`).

If your Experience Cloud site URL looks like this:	Try accessing:
yourcommunity.example.com/	*yourcommunity.example.com/SiteLogin*
yourcommunity.example.com/s	*yourcommunity.example.com/SiteLogin*
example.com/yourcommunity	*example.com/yourcommunity/SiteLogin*
example.com/yourcommunity/s	*example.com/yourcommunity/SiteLogin*

If you see your branded login page or the expected error page for your community, your site seems to be properly configured. However, if you see a default Visualforce page that you didn't expect to see, continue reading to see how you can fix it.

Default Visualforce Pages Exposed by Salesforce Sites

When a Salesforce Site is created, a new set of default metadata is added to your org.

- Visualforce pages, such as *SiteLogin*, *SiteRegister*, and *ForgotPassword*
- Aura components, such as *forgotPassword*, *loginForm*, and *selfRegister*
- Apex classes, such as *MyProfilePageController*, *SiteLoginController*, and *SiteRegisterController*
- Visualforce components, such as *SiteFooter*, *SiteLogin*, and *SiteLogin*
- Static resource (*SiteSamples*)

This metadata is intended as examples and templates that you can reuse to expose custom functionality throughout your site.

For example, if you need a fully personalized login experience, you could reuse and customize the sample code provided in the *SiteLogin* Visualforce page or the *loginForm* Aura component.

Some Visualforce pages are publicly accessible by default.

- *BandwidthExceeded*
- *CommunitiesLanding*
- *CommunitiesLogin*
- *CommunitiesSelfReg*

- `CommunitiesSelfRegConfirm`
- `CommunitiesTemplate`
- `Exception`
- `FileNotFound`
- `ForgotPassword`
- `ForgotPasswordConfirm`
- `InMaintenance`
- `SiteLogin`
- `SiteRegister`
- `SiteRegisterConfirm`
- `UnderConstruction`

To control what is visible through your site, review those pages and classify them into different categories.

- Keep the pages you need and want to expose publicly. For example, you might want to customize the `InMaintenance` page, which is shown when your Experience Cloud site is offline, to reflect your brand.
- Remove the pages that you don't need and shouldn't make publicly accessible. For example, if you don't need a custom login page on your site, you probably don't want to leave the default `SiteLogin` Visualforce page exposed publicly.

Update Public Accessibility Settings for Standard Visualforce Pages of Your Experience Cloud Site

Review the public accessibility settings of your standard Visualforce pages that are associated with your Experience Cloud site, and update them as needed.

If you're performing this review on an Experience Cloud site that is live, assess the impact in a sandbox first before changing anything in production.

1. From Setup, in the Quick Find box, enter `Digital Experiences`, and select **Digital Experiences** > **All Sites**.
2. Next to the site that you want to access, click **Workspaces** > **Administration** > **Pages** > **Go to Force.com**.

   All the pages in the Site Visualforce Pages section are public facing. If your business case calls for all those pages to be public, you can finish your audit here. If not, change the access settings.

3. To edit a page's public access settings, in the Site Visualforce Pages section, click **Edit**. The Enabled Visualforce Pages column lists all the public-facing pages. Move pages in and out of the column to change their public accessibility, and then save.

   If you already use the Experience Builder pages for login and registration, don't enable public access to `SiteLogin`, `ForgotPassword`, `SiteRegister`, or `CommunitiesSelfReg`. However, if your site uses Visualforce pages for login or registration, make sure those pages are publicly exposed.

Check the Visualforce pages every time you create an Experience Cloud site. Have a process in place to apply changes as you implement new sites.

Customize the User Lockout Email Template

EDITIONS

Available in: Experience Builder site

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

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

You can customize the email template you send to users when they attempt to reset their password after getting locked out of your Experience Cloud site due to too many failed login attempts. You can change the look to match your brand and how and when users can unlock their accounts.

Users are unable reset their passwords when their accounts are locked. Depending upon their password policy, they may need to wait awhile or contact an admin to unlock their account before they can reset their password. Admins set the password policy, including the maximum allowable invalid login attempts, on the site user's profile page. This password policy determines the next steps users take to unlock their account. The default email template includes a formula that checks the profile's password policy and pulls that information into the notification sent.

The user lockout email template is available to Experience Builder sites as of Summer '18.

1. From Setup, enter `All` in the Quick Find box, and select **All Experiences**. Next to your site, click **Workspaces**.
2. Select **Administration**, and then select **Emails**.
3. Under Email Templates, click next to User Lockout, and select **Experiences: User Lockout Email**.
4. Click **Save**.
   Your site is set up to send notifications to users when they're locked out of their accounts.
5. To change the formula or make other customizations, edit the email template.

   Note:
   - The formula included in this template is only for lockout emails. When applied to another email type, the formula returns a blank message.
   - The `{!Community_url}` merge field isn't available for the lockout template.

   a. From Setup, enter `Email Templates` in the Quick Find box, then select **Classic Email Templates**.
   b. Next to Experiences: User Lockout Email, select **Edit**.
   c. Edit the text in the email body. To personalize your email content, use the available merge fields listed at the top of the page.
   d. Click **Save**.

Example: If the password policy locks users out for 15 minutes before they can try to log in again, the formula returns the following message: "Try again in 15 minutes."

Subject You've been locked out of {!Community_Name}

Plain Text Preview

Hello {!Receiving_User.FirstName},

We received your request to reset your {!Community_Name} password. We can't reset your password right now. Your account is locked after too many login attempts.

{!CASE(1,
IF(VALUE(PASSWORD_LOCK_TIME) > 0, 1, 0), "Try again in " + PASSWORD_LOCK_TIME + " minutes.",
IF(VALUE(PASSWORD_LOCK_TIME) < 0, 1, 0), "Contact your " + Community_Name + " administrator to unlock your account.",
"")}

If you didn't request a password reset or haven't tried to log in to your account recently, contact your {!Community_Name} administrator or reply to this email.

Thank you,
{!Community_Name}

Customize the Email Address Change Template

You can customize the email template you send to users when they change the email address they use with Salesforce. Change the look to match your brand and the wording of the message.

Salesforce sends two verification emails to a user when the user changes their email address. One is sent to the user's old email address, and one is sent to the new one. The user clicks the verification URL in the email sent to the new address, and completes the email address change. You can customize those emails. If you change a user's email address for them, no email change verification email is sent.

The Email Address Change Verification email templates are available to Experience Builder sites as of Winter '21.

1. From Setup, enter `All Experiences` in the Quick Find box, and select **All Experiences**. Next to your site, click **Workspaces**.
2. Select **Administration**, and then select **Emails**.
3. Under Email Templates, click next to Old Email Address Change Verification and select **Experiences: Old Email - Change Email Verification**.
4. Under Email Templates, click next to New Email Address Change Verification and select **Experiences: New Email - Change Email Verification**.
5. Click **Save**.
   Your site is set up to send notifications to users when their email addresses change.
6. To make customizations, edit the email template.

   Note: You can use the `{!ChgEmailVer.NewEmail}`, `{!ChgEmailVer.OldEmail}`, and `{!ChgEmailVer.URL}` merge fields.

   a. From Setup, enter `Email Templates` in the Quick Find box, then select **Classic Email Templates**.
   b. Next to Experiences: Old Email - Change Email Verification or Experiences: New Email - Change Email Verification, select **Edit**.
   c. Edit the text in the email body. To personalize your email content, use the available merge fields listed at the top of the page.
   d. Click **Save**.

Example:

EDITIONS

Available in: Experience Builder sites

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

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

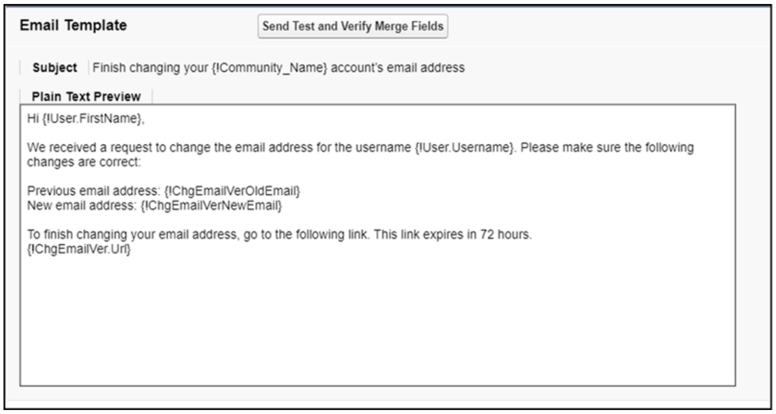
- Be a member of the site AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site



Email Template Send Test and Verify Merge Fields

Subject Finish changing your {!Community_Name} account's email address

Plain Text Preview

Hi {!User.FirstName},

We received a request to change the email address for the username {!User.Username}. Please make sure the following changes are correct:

Previous email address: {!ChgEmailVerOldEmail}
New email address: {!ChgEmailVerNewEmail}

To finish changing your email address, go to the following link. This link expires in 72 hours.
{!ChgEmailVer.Url}

SEE ALSO:

Customize Email Sent from Experience Cloud Sites for Email Verification

Merge Fields for Experience Cloud Sites

Enable Notifications in Experience Builder Sites

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

Available in: Lightning Experience

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

USER PERMISSIONS

To create permission sets:
- Manage Profiles and Permission Sets

To assign a permission set to a user:
- Assign Permission Sets

To create, customize, or publish a site:
- Create and Set Up Experiences AND View Setup and Configuration

All events that trigger notifications are supported (note that replies don't trigger notifications). Members can even trigger notifications on record feeds. For example, an internal member can trigger a notification from the Salesforce org by @mentioning an external member on a lead or opportunity. When a member clicks a notification, the originating detail page or other appropriate location is displayed for easy collaboration across sites and apps.

Note: If you use the Build Your Own (Aura) template, create the Feed Detail page so you can see notifications.

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

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

Enable the App Launcher in Experience Builder Sites

Display the App Launcher in Experience Builder Sites to make it easy for members to move between their sites and their Salesforce org. This functionality is available in any site based an Experience Builder site template or Lightning Bolt solution.

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

USER PERMISSIONS

To create permission sets:
- Manage Profiles and Permission Sets

To assign a permission set to a user:
- Assign Permission Sets

To let members see the App Launcher:
- Show App Launcher in Experience Builder sites

To create, customize, or publish an Experience Builder site:
- Create and Set Up Experiences AND View Setup and Configuration

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

The App Launcher is automatically enabled for new sites, but for older sites, you may need to enable it manually.

1. In Experience Builder, select the **Navigation Menu** component in the page you're configuring.
2. To display the App Launcher in existing sites, ensure **`Hide App Launcher in site header`** is deselected.
3. To let users see the App Launcher, ensure the Show App Launcher in Experiences Builder sites permission is enabled in user profiles in Setup. By default, this user permission is enabled for all standard profiles but it's not enabled for custom profiles. Enable this user perm on custom profiles or create a permission set.

Note: The App Launcher isn't available in Salesforce Tabs + Visualforce sites. Members who use Salesforce Tabs + Visualforce sites and Salesforce Classic can use the global header to switch between their sites and their Salesforce org.

SEE ALSO:

Switching Between Your Salesforce Org and Your Experience Cloud Sites
Enable the Global Header for Salesforce Tabs + Visualforce Sites

Customize Salesforce Tabs + Visualforce Sites

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

You can customize your site at any time, but if you plan to make major changes, we recommend deactivating the site first.

1. Open Experience Workspaces or Experience Management.
2. Click **Administration**, then select what you want to customize.

   Important: The options available in Experience Management or Experience Workspaces are based on your site template selection, permissions, and preferences. For example, if your site doesn't use topics, you don't see the Topics section. Some options in the following list might not appear in your site by default. To display all sections, go to **Administration** > **Preferences** and enable **Show all settings in Experience Management** or **Show all settings in Experience Workspaces**.

   - Administration
   - Administration
   - Administration
   - Administration
   - Administration
   - Administration
   - Administration
   - Settings

3. To share the site with stakeholders while it's still in Preview, copy the URL displayed on the **Administration** > **Administration** page.

   By sharing your site in Preview, you can get useful feedback to incorporate before going live. Also, by having early members post, comment, and share records, your site appears active when members log in to the site for the first time.

   Keep in mind that you must add users as members of the site before you can share the site URL.

After you finish customizing your site, activate the site to make it available to members. If you enable welcome emails when you activate, a welcome email is sent to all members. If users are new portal users, their welcome email includes their username and password.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To access Experience Workspaces or Experience Management:

- Access Experience Management OR Manage Experience OR Create and Set Up Experiences
- AND is a member of the site

To access moderation rules and criteria:

- Manage Experiences OR Create and Set Up Experiences

To customize administration settings or use Experience Builder:

- Create and Set Up Experiences

IN THIS SECTION:

Brand Your Salesforce Tabs + Visualforce Site

If you're using the Salesforce Tabs + Visualforce template, you can customize the look and feel of your site in Experience Workspaces or Experience Management. You can add your own logo, colors, and copyright so that your site matches your company's branding and is instantly recognizable to your site members.

Enable the Global Header for Salesforce Tabs + Visualforce Sites

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

Add Tabs to Your Salesforce Tabs + Visualforce Site

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

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

Before you begin, keep these things in mind:

- Enable the tabs that are required for the type of activity you're performing in this site. For example, sharing accounts and opportunities with your partners or sharing cases and solutions with customers who need support. Don't clutter your site with tabs that users don't need.
- Profiles control access to tabs. If a profile doesn't have access to a tab, the tab is hidden for that profile in the site. In that case, you must manually expose the tabs in the profiles for your site members so that they can see the tabs in the site.
- Lightning Component tabs aren't supported in Experience Cloud sites.
- Chatter Free users in your site don't see any tabs except the Chatter tab.

After you identify the features you want your site members to see, you can expose those features by choosing the corresponding tabs during setup. The tabs that you select also determine site navigation in the Salesforce mobile app.

1. Open Experience Workspaces or Experience Management.
2. Click **Administration** > **Tabs**.

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

3. Select the tabs to include in your site from the Available Tabs list. To select multiple tabs, press CTRL.
4. To add a tab, click **Add**. To remove a tab, select it in the Selected Tabs list and click **Remove**.
5. To change the order that the tabs display, click **Up** or **Down**.

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

   If members don't have access to the site landing tab, they see the first tab that they have access to from the selected site tabs. If they don't have access to any of the tabs, they see the Home tab.

6. Click **Save**.

Important: Changing from the Salesforce Tabs + Visualforce template to an Experience Builder–based template removes all tabs from your site.

SEE ALSO:

Customize Salesforce Tabs + Visualforce Sites

Rename the Chatter Tab

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To create an Experience Cloud site:

- Create and Set Up Experiences AND View Setup and Configuration

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

Rename the Chatter Tab

Most likely, many of your Experience Cloud site members 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 Experience Cloud site members to see what's most important to them: activity feeds, groups, bookmarks, files, and more. Many of your site members use the Chatter tab as their home base. Customize the name of the Chatter tab in your site to match your company branding—. For example, you can use your company's name or any other name that would be recognizable to your members.

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

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To rename the Chatter tab:

- Customize Application

  OR

  View Setup and Configuration

  AND

  Be designated as a translator

Brand Your Salesforce Tabs + Visualforce Site

If you're using the Salesforce Tabs + Visualforce template, you can customize the look and feel of your site in Experience Workspaces or Experience Management. You can add your own logo, colors, and copyright so that your site matches your company's branding and is instantly recognizable to your site members.

Important: Follow these steps to design your site's branding. If you're using the Experience Builder to create your custom pages, you can use the Experience Builder instead.

1. Open Experience Workspaces or Experience Management.
2. Click **Administration** > **Administration**.
3. Use the lookups to choose a header and footer for the site.

   First upload the files for your header and footer to the Documents tab. The header can be a GIF, JPG, or PNG file with a maximum file size of 20 KB. The footer must be an HTML file. The maximum file size for all HTML files is 100 KB. So if you have a footer HTML file that is 70 KB and you want to use an HTML file for the header, it must be 30 KB or smaller.

   The header you choose replaces the Salesforce logo below the global header. The footer you choose replaces the Salesforce copyright and privacy footer.
4. To choose a predefined color scheme, click **Select Color Scheme**. To select a color from the color picker, click the text box next to the page section fields.

   Here's how selected colors show up in your site and in the Salesforce mobile app.

Color Choice	Where It Appears
Header Background	Top of the page, under the black global header. If you select an HTML file in the Header field, it overrides this color choice. Top of the login page. Login page in the Salesforce mobile app.
Page Background	Background color for all pages in your site, excluding the login page.
Primary	Tab when it's selected.
Secondary	Top borders of lists and tables. Button on the login page.
Tertiary	Background color for section headers on edit and detail pages.

5. Click **Save**.

SEE ALSO:

Customize Salesforce Tabs + Visualforce Sites

Brand Your Experience Cloud Site's Login Page

Create Dynamic Branding URLs

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

Enable the Global Header for Salesforce Tabs + Visualforce Sites

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

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

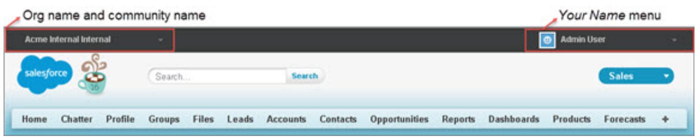
USER PERMISSIONS

To create permission sets:
- Manage Profiles and Permission Sets

To assign a permission set to a user:
- Assign Permission Sets

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

Important: The global header is visible only in Salesforce orgs using Salesforce Classic. Salesforce orgs using Lightning Experience can use the App Launcher to switch between the org and various experiences.



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

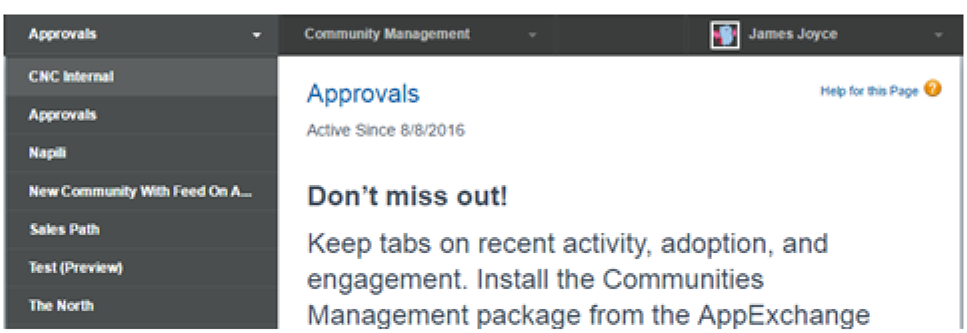
1. From Setup, enter `Permission Sets` in the `Quick Find` box, then select **Permission Sets**.
2. Click **New** and create a permission set that includes the System Permission `View Global Header`.
3. Assign the permission set to the appropriate users.

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

The *`Your Name`* menu on the right side contains links to edit contact information and log out. Internal users can also access Salesforce Help and links to Setup and other tools depending on user permissions and enabled features.

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

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



SEE ALSO:

Switching Between Your Salesforce Org and Your Experience Cloud Sites

Enable the App Launcher in Experience Builder Sites

Override Default Pages in Your Salesforce Tabs + Visualforce Site

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To create an Experience Cloud site:

- Create and Set Up Experiences AND View Setup and Configuration

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

For Salesforce Tabs + Visualforce sites, you can use company-branded Home and Service Not Available pages by overriding the standard pages in your site.

Note: These settings don't apply to Experience Builder sites.

- Use a Custom Home Page in Your Salesforce Tabs + Visualforce Site
- Use a Custom Service Unavailable Page in Your Salesforce Tabs + Visualforce Site

You can override other default pages in the Site Details settings for your Salesforce Tabs + Visualforce site. To do this, open Experience Workspaces. Under Administration, click **Pages** and then click **Go to Force.com**. For Salesforce Tabs + Visualforce sites, page selections in Administration automatically override any previously specified page selections in the Site Details settings.

Use a Custom Service Unavailable Page in Your Salesforce Tabs + Visualforce Site

On rare occasions, if your Salesforce Tabs + Visualforce site isn't available because of a service outage, Salesforce displays a generic Service Not Available page with Lightning Platform branding. You can replace this page with a custom company-branded static resource page for a personalized user experience for your Salesforce Tabs + Visualforce site members.

The Service Not Available static resource:

- Must be a public .zip file 5 MB or smaller.
- Must contain a page named `maintenance.html` at the root level of the .zip file. Other resources in the .zip file, such as images or CSS files, can follow any directory structure.
- Must contain only files that have file extensions.

For more information, refer to *Assigning Salesforce Site Error Pages* in Salesforce Help .

Note: This setting doesn't apply to Experience Builder sites created with Experience Cloud. You can upload an Experience Builder Service Not Available page to your Salesforce Tabs + Visualforce site as a static resource, after it has been saved.

1. Open Experience Workspaces or Experience Management.
2. Navigate to **Administration** > **Pages**.
3. To search for and select your cutom page, click next to **Service Not Available**.
4. Click **Save**.

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

- This page selection doesn't affect sites that use Site.com Studio pages.

- The Service Not Available page, after it is customized, is available for all Salesforce Tabs + Visualforce sites in the same domain. Depending on the needs of your organization, this may not be desirable. To avoid using the same page for all the sites in your domain, create and assign separate Service Not Available pages for each site.

  For example, consider a scenario where you have two Salesforce Tabs + Visualforce sites in your domain: a customer community (`universaltelco.my.site.com/customer`) and a partner portal (`universaltelco.my.site.com/partner`). If you use a custom Service Not Available page for the customer community, then the partner portal displays the same page during a service outage. You can create and assign a separate Service Not Available page to the partner portal.

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

  For example, sites `https://www.example.com/` and `https://www.example.com/site1` have assigned Service Not Available pages. Site `https://www.example.com/site2` doesn't have an assigned Service Not Available page.

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

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

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

SEE ALSO:

Use a Custom Service Not Available Page for Your Experience Builder Site

Use a Custom Home Page in Your Salesforce Tabs + Visualforce Site

Personalize the standard Salesforce Tabs + Visualforce site home page with company branding by using a custom Visualforce or Site.com Studio page.

The Salesforce Tabs + Visualforce home page is shown to unauthenticated users in a public site and it allows you to specify a landing page for guest users without setting up redirects. This page is also known as your Active Site Home page.

Note: This setting doesn't apply to Experience Builder sites.

1. From Setup, enter `Digital Experiences` in the Quick Find box, then select **All Sites**. Click **Workspaces** for the site you'd like to access.
2. Click **Administration** > **Pages**.
3. For the Home page:
   a. Select the page type: **Visualforce** or **Experience Builder** (to select a published Site.com Studio page).

      Note: If you select **Experience Builder**, only published Site.com Studio pages are included in the search results. You can't select pages from Experience Builder.

   b. Enter the name of the page or leave the field blank to get a list of available options.
   c. Click , then click the name of the page in the search results to select it.
4. Click **Save**.

For Salesforce Tabs + Visualforce sites, page selections in Administration automatically override any previously specified page selections in the Site Details properties.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

Configure the Default Login Page to Use a Custom Home Page

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

Edit the `CommunitiesLandingController` so that it has the correct `startURL` for your Salesforce Tabs + Visualforce site. The `CommunitiesLandingPage` is the Active Site Home Page for your site, meaning that it is shown when someone enters a direct URL to your site. For instance, if your domain is *`universaltelco.my.site.com`* and your site URL is *`customers`*, the `CommunitiesLandingPage` is shown when someone enters `https://universaltelco.my.site.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, enter *`Apex Classes`* in the Quick Find box, then select **Apex Classes**.
  2. Click **Edit** next to `CommunitiesLandingController`.
  3. Replace the code so that it reads:

```
public with sharing class CommunitiesLandingController {
public PageReference forwardToStartPage() {
}
}
```

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

- Alternatively, you can replace the Active Site Home Page with a custom Visualforce page.
  1. From Setup, enter *`Digital Experiences`* in the Quick Find box, then select **All Sites**.
  2. Click **Workspaces** next to the site name.
  3. Click **Administration** > **Pages** > **Go to Force.com**.
  4. In the Site Detail section, click **Edit**.
  5. In the `Active Site Home Page` field, select your custom Visualforce page.
  6. Click **Save**.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To access Experience Workspaces:

- Manage Experiences OR Create and Set Up Experiences
- AND is a member of the site

To customize administration settings:

- Create and Set Up Experiences
- AND is a member of the site

To edit Apex classes:

- Author Apex

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

Add Custom Pages That Don't Require Login

Within a site, portal, or community created with Experience Cloud, you can have publicly available pages that are accessible without requiring login, making them ideal for landing or marketing pages.

Important: This topic applies only to sites created with Salesforce Tabs + Visualforce.

Salesforce Tabs + Visualforce sites use Salesforce Sites technology to set a custom domain for your org and a URL prefix for each site created. If you want to further customize your sites beyond what's available in setup, you can use Salesforce Sites or Site.com to create customized pages.

Tip: Salesforce Tabs + Visualforce sites can have a combination of Visualforce and Site.com pages. By default, the pages you create don't require login, but you can add authenticated pages if needed.

1. Open Experience Workspaces or Experience Management.
2. Click **Administration** > **Pages** and then in the Advanced Customizations area, click either:
   - **Go to Lightning Platform** to create pages that don't require login or edit out-of-the-box error pages.
   - **Go to Site.com Studio** to open Site.com Studio, where you can create public, branded pages. (You can also create authenticated pages that require login.)
3. After you create a public page in Site.com Studio, you must publish the Site.com site to allow users to access the page.

For more information about creating pages, refer to these resources:

- Creating Site.com Pages
- Managing Salesforce Site Visualforce Pages
- Manage Salesforce Sites Standard Pages

Share a Link to Your Experience Cloud Site

You can allow members to preview your Experience Cloud site before making it active.

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

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

1. Open Experience Workspaces.
2. Click **Administration** > **Settings**.
3. Copy the URL displayed on the page and share it with your stakeholders.

SEE ALSO:

Customize Salesforce Tabs + Visualforce Sites

Experience Cloud Site Statuses

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To share a preview URL for your site:

- Create and Set Up Experiences

Redirect Users to Your Experience Cloud Site Pages

Redirect users to your Experience Cloud site pages from non-Salesforce pages on the same domain or within the same Experience Cloud site.

When you redirect your pages to Experience Cloud site pages, you maintain the discoverability and SEO equity of your Aura and LWR sites.

EDITIONS

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

USER PERMISSIONS

To create an Experience Cloud site:

- Create and Set Up Experiences AND View Setup and Configuration

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

1. To set up URL redirects, add the source and target URLs to a CSV file. You can use the provided sample CSV template to add your URLs.

   External Redirects

   The source URL is the external page that you want to direct your users away from. The target URL is the Experience Cloud site page that you want to redirect your users to. For the source URL, include everything after the domain name. For the target URL, include everything after /s.

   Sample CSV Template

   ```
   /source, /target
   /case/oldCaseLocation, /case/500RM000003UjsEYAS/my-case-2
   ```

   In this example, `https://`***`MyDomainName`***`.com/case/oldCaseLocation` redirects to `https://`***`MyDomainName`***`.com/TargetSite/s/case/500RM000003UjsEYAS/my-case-2`.

   Internal Redirects

   The source URL is the Experience Cloud site page you want to direct your users away from. The target URL is the page in the same Experience Cloud site where you want to redirect your users to. For the source and target URLs, include everything after the domain name.

Sample CSV Template

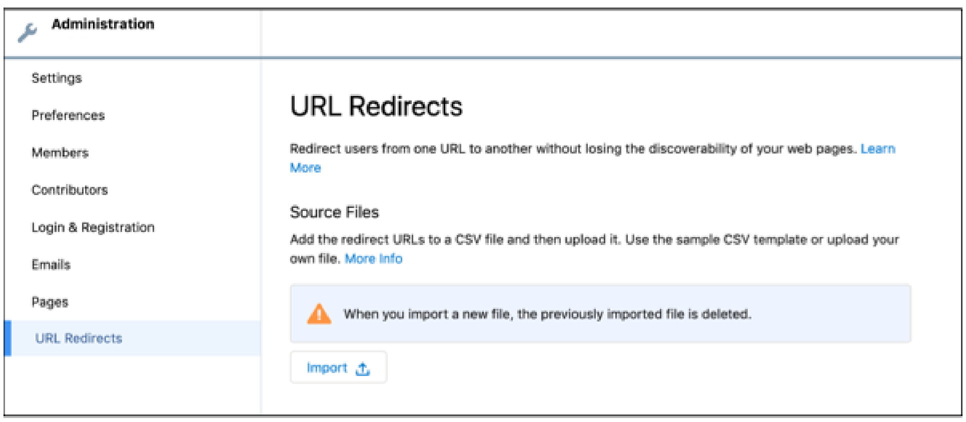
```
/source, /target
/TargetSite/s/account/001RM000005Su9JYAS/acme, /newaccount/001RM000005Su9JYAS/acme
```

In this example, `https://`***`MyDomainName`***`.com/TargetSite/s/account/001RM000005Su9JYAS/acme` redirects to `https://`***`MyDomainName`***`.com/TargetSite/s/newaccount/001RM000005Su9JYAS/acme`.

Note: Variables in the URLs aren't yet supported. Provide the exact URL string.

2. To import your CSV file in Experience Workspaces, click **Administration** > **URL Redirects** > **Import**. The redirects go live as soon as they're successfully uploaded.

   Note: Importing a new CSV file overwrites the existing redirect file. To add URLs redirects without replacing existing redirect rules, first export your existing redirects as a CSV file. Add the new URLs to the file you downloaded, and then import the CSV file again.



URL Redirects setup considerations

- If the file size is 10,240 bytes or smaller and uploads successfully, a summary of your most recent import appears on the URL Redirects page.
- If the file size exceeds 10,240 bytes, or if the total number of URLs previously imported is over 100, an email notifies you of the import status. Refresh the URL Redirects page to see your import summary.
- You can add up to 6,000 URLs per org by default. To configure more URLs, contact Salesforce Support.
- To delete or deactivate existing redirects, use the Lightning Platform REST API to interact with the SiteRedirectMapping object. Don't import a blank CSV file from the URL Redirects page.
- To configure internal redirects for a site that exists on multiple domains, create redirect entries with the corresponding path prefixes for all of the domains. For example,

```
MyDomainCommunity/s/source, /target
/CustomDomainCommunity/s/source, /target
```

Activate Your Site

Activate your site to make it accessible to members. The result of activation differs somewhat depending on whether you have a Salesforce Tabs + Visualforce site or a Lightning site.

- **Salesforce Tabs + Visualforce**: Activating the site makes the site URL active and enables login access for members. If welcome emails are enabled when you activate, a welcome email is sent to all members. If any of those users are new users, their welcome email includes their username and password.
- **Lightning sites**: Activating the site sends out a welcome email to all members. Activation is also required to successfully set up SEO for Lightning sites. To make the URL active and enable login access for members, publish the site.

Note: If your organization has enabled enhanced domains, site traffic is routed through a Salesforce content delivery network (CDN) partner. The partner is Akamai. Contact Salesforce Customer Support to opt out of the Salesforce CDN.

To activate a site:

1. From Setup, enter `Digital Experiences` in the global search box. Select **Sites**.
2. Open Experience Workspaces or Experience Management.
3. Click **Administration** > **Administration**.
4. Click **Activate**.
5. Click **OK**.

   Note: To ensure your contributors can access Experience Builder and Workspaces in an inactive community, enable the "Modify All Data" permission.

SEE ALSO:

Experience Cloud Site Statuses

Customize Salesforce Tabs + Visualforce Sites

Deactivate an Experience Cloud Site

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To create an Experience Cloud site:

- Create and Set Up Experiences AND View Setup and Configuration

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

Experience Cloud Site Statuses

Experience Cloud sites can have one of these statuses: preview, inactive, and active.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

Status	Description
`Preview`	Customization of the Experience Cloud site isn't complete, and the site has never been activated. Once you activate an Experience Cloud site, you can't go back to `Preview` status. Users with Create and Set Up Experiences can access sites in `Preview` status if their profile or permission set is associated with the site. They can also share a link to these sites with users whose profiles or permission sets are associated with the site. The link for sharing a `Preview` site is located in Experience Workspaces, under Administration. No welcome emails are sent even if `Send welcome email` is selected. Note: If your org's access to Experience Cloud is suspended for non-payment, all your sites are deactivated, including those in Preview. When Experience Cloud is re-enabled, all sites are inactive. You can activate them, but you can't return to the Preview state.
`Inactive`	The Experience Cloud site was previously `Active` but was deactivated. You may want to deactivate a site if you need to: • Add or remove members • Add, remove, or change the order of tabs • Change the color scheme • Change the site URL When you deactivate an Experience Cloud site , it no longer appears in the dropdown menu. Users with Create and Set Up Experiences can still access the setup for `Inactive` sites regardless of membership. If members try to access `Inactive` sites using a direct link, they see an error page. Welcome emails are sent if `Send welcome email` is selected or if the user's email settings are not enabled.
`Active`	The Experience Cloud site is active and available to members. Welcome emails are sent to new members if `Send welcome email` is selected.

SEE ALSO:

Customize Salesforce Tabs + Visualforce Sites
Activate Your Site
Deactivate an Experience Cloud Site
Share a Link to Your Experience Cloud Site

Update Your Experience Cloud Site Settings

Manage your Experience Cloud site name, description, status, and template all from one location.

You can change your site name and URL after the site is activated, but users aren't redirected to the new URL. So be sure to inform your members before changing the name or URL.

1. Open Experience Workspaces.
2. Click **Administration** > **Settings**.
3. Edit your settings as needed.
   - Select next to the site you want to change, and make your changes. You can change your URL from this page. However, if you've already activated your site, users aren't redirected to the new URL.
   - Manage the status of your site.
   - Change the template.

SEE ALSO:

Change Your Experience Cloud Site Template

Experience Cloud Site Statuses

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

Deactivate an Experience Cloud Site

You may want to deactivate an Experience Cloud site if you need to add or remove members; add, remove, or change the order of tabs; change the color scheme; or change the URL.

1. From Setup, enter `Digital Experiences` in the Quick Find box, then select **All Sites**.
2. Click **Workspaces** next to the site you want to deactivate.
3. Click **Administration** > **Settings**.
4. Click **Deactivate**.

   Your site is inactive and offline.

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

SEE ALSO:

Experience Cloud Site Statuses
Activate Your Site
Customize Salesforce Tabs + Visualforce Sites

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To create an Experience Cloud site:

- Create and Set Up Experiences AND View Setup and Configuration

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

Change Your Experience Cloud Site Template

If you use the Salesforce Tabs + Visualforce template, you can change your template to an Experience Builder template or any installed Lightning Bolt Solution in Experience Builder.

Note: Apart from the Help Center template, we don't recommend changing from one Experience Builder template to another. So for example, avoid changing from a Customer Service template to a Partner Central template. Although the functionality is available for these templates, we recommend that you start afresh with a new Experience Cloud site instead. If you do change from one Experience Builder template to another and lose your customizations, Salesforce Customer Support is unable to assist you.

Important: There is no data loss when you change templates, but all customizations are lost. Be sure to review Considerations for Changing Your Template before changing your template.

1. Open Experience Workspaces.
2. Click **Administration** > **Settings**. A message warns you that changing your site s template permanently deletes all existing customizations and pages.
3. Click **Change Template**.
4. Choose the template you want to switch to.
5. When prompted, select **Change Template** to confirm your changes.

After you change the template, you are taken back to Experience Workspaces.

Check to make sure your site pages, such as the Login page or Home page, are still the best choice for your updated site template. For example, if you previously had a Salesforce Tabs + Visualforce template and switch to the Customer Service template, update your pages to use Experience Builder pages instead of Visualforce pages. If necessary, customize your site in Experience Builder and publish any changes you make.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To create an Experience Cloud site:

- Create and Set Up Experiences AND View Setup and Configuration

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

Considerations for Changing Your Template

Changing your template affects the Experience Cloud site navigation, branding, and customizations.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

> Note: Apart from the Help Center template, we don't recommend changing from one Experience Builder template to another. So for example, avoid changing from a Customer Service template to a Partner Central template. Although the functionality is available for these templates, we recommend that you start afresh with a new Experience Cloud site instead. If you do change from one Experience Builder template to another and lose your customizations, Salesforce Customer Support is unable to assist you.

- When you change your template, Salesforce object data carries over, but branding and component customizations don't. As a result, you must reconfigure any customizations in the new template.
- Changing the template updates the available options in Experience Workspaces. To view all available options regardless of template selection, select **Administration** > **Preferences** > **Show all settings in Workspaces**.
- Your Experience Cloud site URL changes when switching from a Salesforce Tabs + Visualforce template to any other template type. Specifically, `/s` is appended to the site URL. Be sure to update any links to your site with the updated URL.
- In active Experience Cloud sites:
  - When you switch to an Experience Builder template, your template change is saved in a draft version. Use the draft version to further customize your site in Experience Builder. Yoursite is updated only after you publish your changes.
  - When you switch to the Salesforce Tabs + Visualforce template from any other template, your changes immediately reflect in your active site. In this scenario, we recommend that you deactivate your site before you change your template. After you've made all your changes, reactivate the site.
  - If your template is listed as `None`, then you're not using a predefined template or you're using a modified version of one.
- After importing a B2B Commerce template, the My Account and Lists options on navigation menus, such as the Customizable User Profile Menu, require some follow-up. Edit the menu and reconnect these options with their pages.

Enable Optional Experience Cloud Site Features

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

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

1. Open Experience Workspaces.
2. Click **Administration** > **Preferences**.
3. Change the desired settings.

   General

   - Show nicknames instead of full names in your site. Enabling nickname display allows more privacy and protects member identities. This protection is especially helpful in a public site where unregistered visitors can access member profiles.
   - Enable Chatter messages, which allows members to have secure private conversations with other Chatter users. To expose Chatter messages for external users, administrators must also enable the Chatter tab in sites using the Salesforce Tabs + Visualforce template.
   - Enable direct messages, which allows members to have secure private conversations in sites built using the Customer Service template.
   - Let guest users view asset files and CMS content available to the site. Asset files include images associated with topics, recognition badges, site branding, and account branding. If public access is enabled in Experience Builder at the page or site level, this preference is automatically enabled.
   - Use custom Visualforce error pages, if you want authenticated users to see your custom branded Visualforce error pages.
   - Show all settings in Workspaces that are hidden by default based on how you set up your site. Enabling this setting overrides the dynamic navigation provided in Experience Workspaces.

   Experience Management

   - Allow members to flag posts, comments, or files for moderation on page 672. Members can flag items that contain inappropriate language or sensitive information.
   - Enable Upvotes and Downvotes to allow members to participate in evaluating the worth of a question or answer. Up and down voting is enabled by default in sites created as of Winter '18 and later.
   - Enable Reputation on page 722 to allow community managers to set up a point system that rewards users who participate in the site. Administrators set up corresponding reputation levels that users see on their profile.
   - Enable knowledgeable people on page 722so you can discover who's knowledgeable on topics and endorse people for their knowledge on a topic.

   Files

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

4. Click **Save**.

These additional optional features can be found in Setup and other areas of Experience Workspaces.

- Assign Permission to Verify Answers for Your Company to allow selected members to mark an answer as company verified.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

- Assign Post Pinning Permission to allow selected members to pin a critical post to the top of a group or topics feed.
- Assign a Default Experience to a User Profile to associate that profile with a specific Experience Cloud site. Notification emails about site-agnostic objects, like cases, accounts, and opportunities, take on the default site's branding. Links in the emails take users to the default site—no more news from nowhere.
- Add Rich Publisher Apps to Your Feeds to enhance your feeds with items that are unique to your business process.

IN THIS SECTION:

Show Nicknames Instead of Full Names in an Experience Cloud Site

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

Streamline Customer Support with Customer Insights

Customer Insights informs support agents working in the Service Console whether the customer has looked at the pertinent documentation. It also shows if the customer has filed a case before calling support. As a result, agents don't suggest articles that a customer has accessed or open duplicate cases, decreasing customer frustration and improving support.

Use Custom Visualforce Error Pages for Authenticated Users

If you have customized Visualforce error pages, you can have those pages display for authenticated Experience Cloud site users.

Work with Files in Your Experience Cloud Site

Customize Salesforce Files settings and understand file sharing and visibility to get the most out of Files in your Experience Cloud site.

Configure a Custom Domain for Your Experience Cloud Site

Set up a custom domain so that your Experience Cloud site URLs reflect your company brand.

Add the Global Search Box to Your Customized Experience Cloud Site HTML Header

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

Choose a Landing Tab

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

SEE ALSO:

Show Nicknames Instead of Full Names in an Experience Cloud Site

Give Secure Access to Unauthenticated Users with the Guest User Profile

Use Custom Visualforce Error Pages for Authenticated Users

Enable Members to Flag Items in Your Experience Cloud Site

Enable Reputation in Your Experience Cloud Site

Limit Files in Your Experience Cloud Site

Show Nicknames Instead of Full Names in an Experience Cloud Site

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To enable nickname display:

- Create and Set Up Experiences

  AND

  Is a member of the Experience Cloud site

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

All users have nicknames by default, which they can modify by going to `Your Name` > **Settings** in their user profile.

1. Open Experience Workspaces.
2. Click **Administration** > **Preferences**.
3. Select **Show nicknames**, then click **Save**.

Nicknames appear in place of first and last names in almost all locations in the Experience Cloud site. For example, they appear in feeds, list views, groups, search results, recommendations, private messages, and on user profiles and files. The Salesforce mobile app and any sites activated using Experience Builder templates show nicknames as well.

When your users make API calls from a site with nicknames enabled, you can hide the first and last name fields in SOAP API for Experience Cloud site users. Enable the **Hide first and last name fields in the SOAP API for site users, when making API calls from within a site with nicknames enabled** setting in **Setup** > **Digital Experiences** > **Settings**.

A few restrictions to keep in mind about nickname display:

- 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 the Salesforce mobile app show full names. You can turn off mobile notifications in the app to avoid this display.
- Searches by first, last, and full names aren't restricted and return matches, but the search results display only nicknames. Global search auto-complete recommendations show any first, last, and full names that the user has searched by or accessed via a record or another location. The recent items list also shows first, last, and full under the same conditions.

Note: Contact Salesforce Support if you'd like Experience Cloud site users to see nicknames in notifications shown in a site. Some notification types don't support nicknames, and always show first and last names instead.

SEE ALSO:

Enable Optional Experience Cloud Site Features

Streamline Customer Support with Customer Insights

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

Customer Insights informs support agents working in the Service Console whether the customer has looked at the pertinent documentation. It also shows if the customer has filed a case before calling support. As a result, agents don't suggest articles that a customer has accessed or open duplicate cases, decreasing customer frustration and improving support.

IN THIS SECTION:

Set Up Customer Insights

Enable Customer Insights in your org and then set it up for each Experience Builder site you have.

Considerations When Using Customer Insights

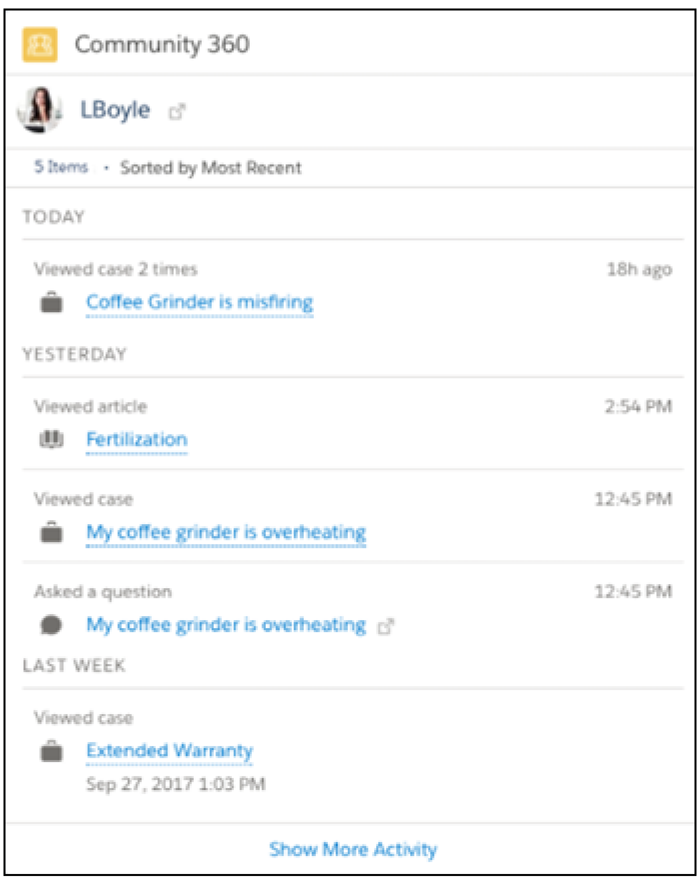
When you enable Customer Insights in your org, you're allowing data to be gathered from site members and stored in Salesforce. Here are some things to keep in mind when using Customer Insights.

Set Up Customer Insights

Enable Customer Insights in your org and then set it up for each Experience Builder site you have.

1. Open Experience Workspaces or Experience Management.
2. Select **Administration** > **Preferences**.
3. Select **Gather Customer Insights data**.
4. Click **Save**.
5. Assign the **View Customer Insights** profile permission to the customer support profiles that require it.
6. If you're using Salesforce console in Lightning Experience, open Lightning App Builder and simply drag the Customer Insights component to any case or contact page layout.
7. If you're using Salesforce console in Salesforce Classic, add the Customer Insights component by placing its Custom Console Component on the contact or case page layout. We recommend placing the component in the left sidebar, stacked, with a 400 pixel width.

   Your support agents see if the customer has opened a case, and which articles have been viewed in a site directly in the Service Console app.



EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To enable Customer Insights in a site:
- Access Experience Management OR Manage Experiences

  AND

  Is a member of the site

To edit profiles:
- Manage Profiles and Permission Sets

  AND

  Customize Application

To create and save Lightning pages in Lightning App Builder:
- Customize Application

Note:

- Customer Insights checks the following: assets, contracts, cases viewed, articles viewed, article votes, posts made, posts viewed, custom objects, orders, products, and tasks.
- Customer Insights data is stored in the `NetworkUserHistoryRecent` object. API access to the object is limited to users with the "Modify All Data" permission.
- Customer Insights isn't available in sandbox environments.
- Articles viewed through the Case Deflection component aren't listed on the Community 360 component that can be added to the contact layout.

SEE ALSO:

Add Console Components to Page Layouts in Salesforce Classic

Considerations When Using Customer Insights

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

When you enable Customer Insights in your org, you're allowing data to be gathered from site members and stored in Salesforce. Here are some things to keep in mind when using Customer Insights.

- Customer Insights gathers and stores page views of logged-in site members. Agents can view activity on articles, assets, contracts, custom objects, discussions, orders, products, and tasks.
- When you enable Customer Insights, you are authorizing data to be gathered from all logged-in site members. You can't exclude specific profiles from being tracked.
- Only Salesforce users with the View Customer Insights profile permission see the Customer Insights data.
- Customer Insights isn't supported in sites created using the Salesforce Tabs + Visualforce template.
- Customer Insights is only available for business accounts, not person accounts.
- Customer Insights doesn't track Salesforce for Android and Salesforce for iOS activity.
- If Customer Insights is enabled and **Data Protection and Privacy** is turned on, privacy settings must be complete for information to stay updated. To avoid missing information, make sure you:
  - Set up the Individual object with the fields you want to track.
  - Add the **Individual** field to the Contacts page layout.
  - From the Individual object, create records for the users you want to track with Customer Insights.
  - Connect user accounts with their Individual records. From a Contact record, find the **Individual** field, and search for the associated user.

  For more information on data protection and the Individual object, see Set Up Tracking and Storage of Certain Data Privacy Preferences.

Use Custom Visualforce Error Pages for Authenticated Users

If you have customized Visualforce error pages, you can have those pages display for authenticated Experience Cloud site users.

To assign or customize your Visualforce error pages, in Experience Workspaces, click **Administration** > **Pages** and click **Go to Force.com**. The **Error Pages** section lists your current page selections.

When **Use custom Visualforce error pages** is selected, users who are logged in to the Experience Cloud site see your custom Visualforce error pages. When **Use custom Visualforce error pages** isn't selected, users logged in to the site see the default Visualforce error pages. Guest users who aren't logged in to the site always see the custom Visualforce error pages, regardless of whether you select the checkbox.

1. Open Experience Workspaces.
2. Click **Administration** > **Preferences**.
3. Select **Use custom Visualforce error pages**, then click **Save**.

SEE ALSO:

Assigning Salesforce Site Error Pages

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

Work with Files in Your Experience Cloud Site

Customize Salesforce Files settings and understand file sharing and visibility to get the most out of Files in your Experience Cloud site.

IN THIS SECTION:

File Visibility and Sharing in Experience Cloud Sites

When sharing and viewing files, context matters. Experience Cloud site files are tied to the site context in which they're created or uploaded, with a few exceptions.

Customize Experience Cloud Site Libraries with Images

Give each library a unique look by branding it with an image.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

Limit Files in Your Experience Cloud Site

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

Make Files on Records Visible to Customers

The Customer Access toggle on a file's sharing detail page lets you decide when customers can see individual files on records.

Display Optimized Images on Mobile Devices

Asset file images are optimized for mobile display in Experience Cloud istes. Mobile-optimized image display creates a version of images that is better suited to a small screen and slower connection. This preference, which is enabled by default, lets customers who use file assets in sites see logos and product images faster on mobile devices.

File Visibility and Sharing in Experience Cloud Sites

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

When sharing and viewing files, context matters. Experience Cloud site files are tied to the site context in which they're created or uploaded, with a few exceptions.

Table 1: File Visibility and Sharing in Experience Cloud Sites

Who	What	File Visibility	File Sharing
Site user	Files - general	Regardless of the Experience Cloud site, users see files: • they own • shared with them directly • shared to an Experience Cloud site they're a member of • shared to a group they can access • they can access within a library • posted to a record they have access to and when visibility on that file is set to allow them to access it Note: When you enable Chatter for your org, make sure you've also enabled Chatter for your users. This way, they can access all Salesforce files in your org, including asset files.	For files that are not in libraries, you can only share them in the Experience Cloud site where they were uploaded. For files in libraries that you can access, you can share them across sites when you share to a record. You can't share files from the file detail page in Experience Cloud sites. Prevent others from sharing and unsharing a file that you own by checking the **Prevent others from sharing and unsharing** option on the file's sharing settings or detail page. Note: Users with the Manage Experiences permission or Access Experience Management can share files across sites. For example, a file created in site A can be shared in site B.
Site user	Files shared with users	To view a file, the user must be a member of the Experience Cloud site the file was created in.	If users can view a file, they can share it, unless the **Prevent others from sharing and unsharing** option is enabled.

Who	What	File Visibility	File Sharing
Site user	Files shared with groups	To view a file shared with a group, the user must have access to the group and the Experience Cloud site where the file was uploaded.	To share a file with a group, the group and the file must be in the same Experience Cloud site.
Site user	Files on records	To view a file on a record, the user requires access to the record. The file visibility on the record must be set to allow site users.	A library file can be shared with a record with no restrictions. Use the Customer Access switch on a file's sharing detail page to allow customers to see individual files on records.
Site user	Files in libraries	Site users who are members of a library can view files in that library.	To share a file with a library, you must be a member of the library. Users with the Manage Experiences permission or Access Experience Management can share library files across sites.
Guest user	Files - general	To give guest users access to files in Experience Cloud sites, select Give access to public API requests on Chatter in **Experience Workspaces** > **Administration** > **Preferences**.	To let guest users upload files in Experience Cloud sites, select **Allow site guest users to upload files** in **Setup** > **Salesforce Files** > **General Settings**.
Guest user	Files shared with records	When your Experience Cloud site allows guest users, they can access a file shared with a record on any entity, such as an account or opportunity. Note: Guest users can view Notes and Attachments but not the Files Related List. Learn how to enable Customer Access for a file.	

Example: To share from a library to a group in an Experience Cloud site, upload the file to the Files component in a site. This is an example of uploading to the library within the context of the site. Alternatively, you can share the file with a record, or custom object that is accessible in the site.

Example:

Note: Salesforce doesn't remove geolocation information from uploaded images.

Customize Experience Cloud Site Libraries with Images

Give each library a unique look by branding it with an image.

Library users can identify libraries at a glance without having to figure out which library to access. Library administrators can change images as libraries evolve or switch off branding.

EDITIONS

Available in: Lightning Experience

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

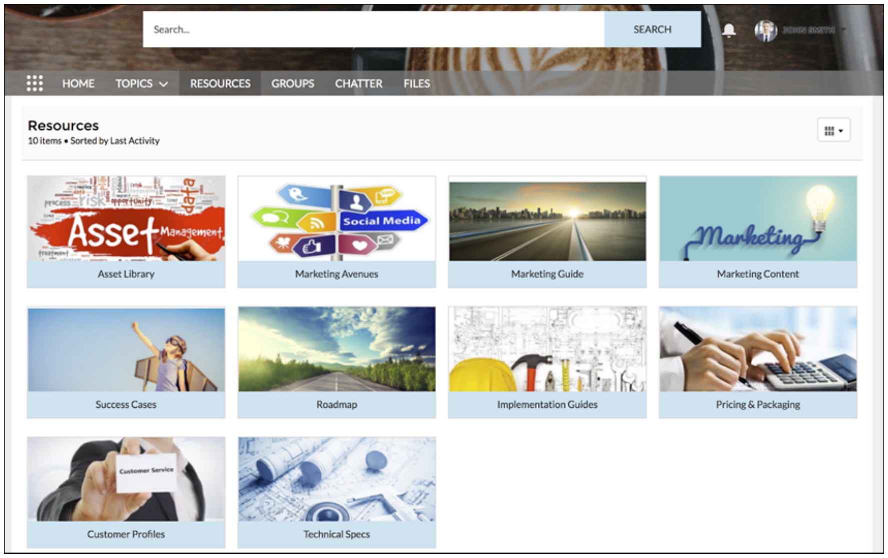
USER PERMISSIONS

To customize a library:

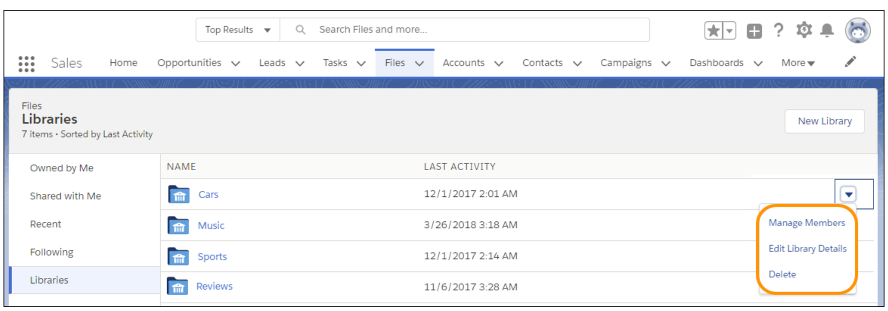
- Manage Salesforce CRM Content

  OR

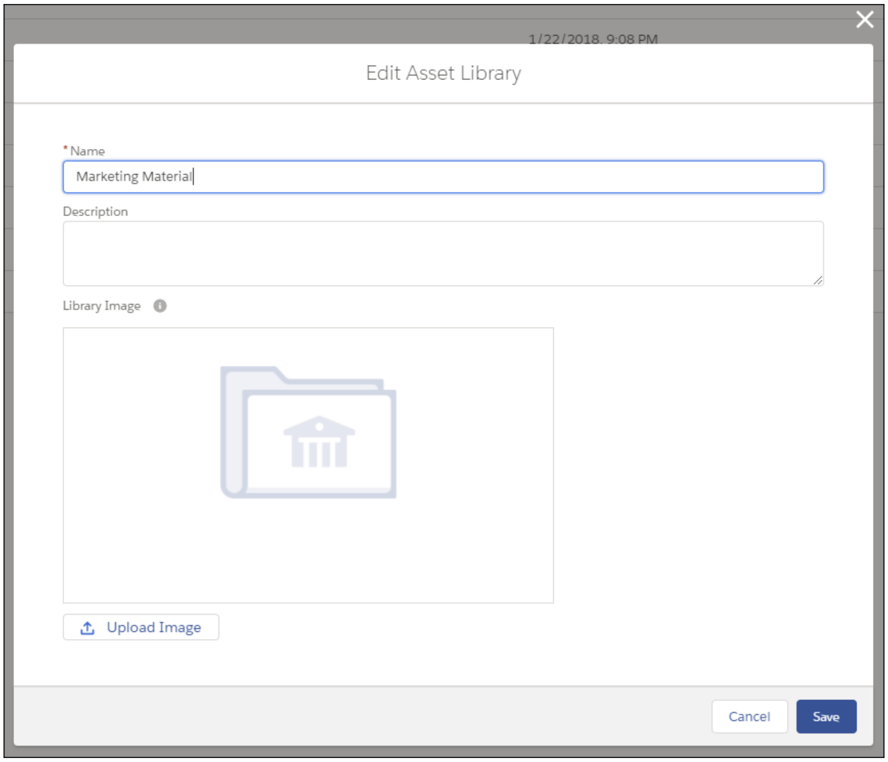
  Manage Library



1. To add a custom library image, from Files Home, click the dropdown to the right of a library, and choose **Edit Library Details**.



2. Click **Upload Image** under Library Image. For best results, choose an image in a 16:9 aspect ratio (for example, 480 pixels by 270 pixels).



Note: Branded library images are visible only in the desktop Libraries component tile view. Depending on their permissions, some external users can see library asset images, even if they're not library members. Choose images that you'd like everyone to see. You can remove custom images anytime. If you don't add a custom image, the default library image appears on the folder.

Limit Files in Your Experience Cloud Site

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

File moderation must be enabled for your org before you can limit files in your Experience Cloud site. If you don't see the option to limit files in Experience Workspaces, contact Salesforce.

Your file limits apply to files uploaded by members anywhere in the site—in posts and comments, directly in the Files tab, and from the Salesforce mobile app. You can also set file limits using SOAP or Metadata API.

Files uploaded before setting your file limits are unaffected. However, newer versions of those files must meet the limits you specify.

Keep the following things in mind:

- A file must meet the file limits set in the Experience Cloud site in which it's uploaded. For example, if a customer uploads a file on a case and then an agent uploads a newer version in your Salesforce internal org, the limits from the customer site still apply.
- Files uploaded in your internal Salesforce org that are shared in a site aren't subject to site file limits.

1. Open Experience Workspaces.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To limit files:

- Manage Experiences OR Create and Set Up Experiences

  AND

  Is a member of the Experience Cloud site

2. Select **Administration** > **Preferences**, then enter your limits in the Files section on the page.
   - `Maximum file size in MB`—Enter a number between 3 MB and your org's maximum file size. To use the default limit of 2 GB, leave this field empty or enter *0*.
   - `Allow only these file types`—Enter file extensions separated with a comma (for example: *jpg,docx,txt*). You can enter lowercase and uppercase letters. You can enter up to 1,000 characters. To allow all file types, leave this field empty.
3. Click **Save**.

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

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

Note: By default, guest user files are blocked from being uploaded. Once developer customizations (Lightning pages, for instance) have been created, admins can change the settings to let guest users upload files. To enable, go to Setup and in **Salesforce Files** > **General Settings** select Allow site guest users to upload files.

Note: Files uploaded by guest users are unassigned. Unassigned files are public by default. We recommend setting up a trigger to assign an owner to files uploaded by guest users. You may also wish to restrict file upload size or type using file moderation.

SEE ALSO:

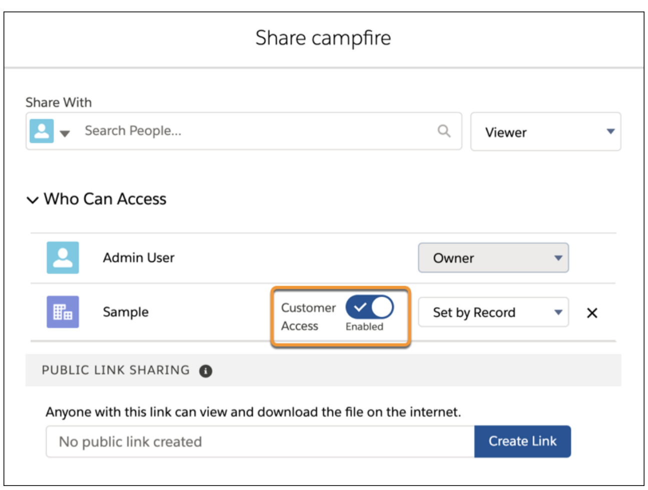
Enable Optional Experience Cloud Site Features

Make Files on Records Visible to Customers

The Customer Access toggle on a file's sharing detail page lets you decide when customers can see individual files on records.

Ensure that your customers can access files on records. Enable digital experiences to view the Customer Access option on a file's sharing detail page. Users with collaborator or owner access to the file can change the Customer Access option. Users with view-only access to the file have read-only access to the Customer Access Option. External users can't see this option.

On Files home in Salesforce, from the row-level action list or file preview, click **Share**. To see where the file is shared, in the sharing detail window, expand the **Who Can Access** section. The customer access option is visible in the sharing detail of any file shared with a record.



To set the sharing level, in the menu next to the Customer Access option, select **Viewer** to give the customer view access to the file. If you choose **Set by Record**, then the customer's file access depends on their record access. View access on the record provides view access to the file, and edit access on the record provides collaborator access on the file. The Customer Access option isn't available to files shared with users, groups, workspaces, Experience Cloud sites, or orgs. If your org doesn't have Experience Cloud enabled, the sharing setting for files on records defaults to **Customer Access - Enabled**. If you do enable digital experiences in your org, check record access settings to ensure you're sharing the files you want with the correct customer users.

Note: You can only share files to records from the record using the Files related list or posting in the record's feed.

To set the sharing settings for files sent through email, make sure that the email is in a draft form for the settings to go into effect.

Note: Salesforce doesn't remove geolocation information from uploaded images.

SEE ALSO:

Make a File Private on a Record

Display Optimized Images on Mobile Devices

Asset file images are optimized for mobile display in Experience Cloud istes. Mobile-optimized image display creates a version of images that is better suited to a small screen and slower connection. This preference, which is enabled by default, lets customers who use file assets in sites see logos and product images faster on mobile devices.

To disable this preference, deselect **Optimize images for mobile devices** in Experience Workspaces under **Administration** > **Preferences**.

Configure a Custom Domain for Your Experience Cloud Site

Set up a custom domain so that your Experience Cloud site URLs reflect your company brand.

Note: HTTPS is required for using a domain with authenticated Experience Cloud sites.

1. From Setup, enter `Domains` in the Quick Find box, then select **Domains**.
2. Click **Add a Domain**.
3. Enter the domain name.
4. Choose the HTTPS domain configuration option you want to serve this domain with. Optionally, specify a CNAME value if you're using a non-Salesforce provider to serve your domain.

   Note: In Professional Edition orgs with Pardot, you must choose **Salesforce serves the domain over HTTPS using a Salesforce content delivery network (CDN) partner**.

5. To avoid vulnerabilities during HTTP redirects and to have supported web browsers always use secure HTTPS connections for your domain, select **Allow HSTS preloading registration**. This setting adds the `preload` directive to the HSTS header. After you enable this setting, you must submit your domain at https://hstspreload.org.

   Note: This setting applies only to domains that are eligible for HSTS preloading. Domain names can consist of a public suffix plus one additional label, For example, `example.com` and `example.co.uk` are eligible, but `www.example.com`, `www.example.co.uk`, and `sub.example.com` aren't eligible.

6. Add a certificate if you have already set up a CA-signed certificate that supports this domain.
7. Click **Save**. To add another domain, click **Save & New**.

USER PERMISSIONS

To view a domain:
- View Setup and Configuration

To add a domain:
- Customize Application OR View Setup and Configuration plus either a Site.com Publisher license or Create and Set Up Experiences

To edit or delete a domain:
- Customize Application

If you plan to host more than one Experience Cloud site on a domain, you'll need to set up custom URLs for each site. Custom URLs are the way to uniquely distinguish the sites within that domain. From Setup, enter *Custom URLs* in the `Quick Find` box, then select **Custom URLs**.

Before pointing your domain name's CNAME to a new target name, ensure that the target name exists in the DNS by using `dig` or `nslookup`. The target of your CNAME depends on when you create your domain name.

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

SEE ALSO:

Manage Your Domains
Manage Domains and Custom URLs
Add a Domain

Add the Global Search Box to Your Customized Experience Cloud Site HTML Header

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

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

You can add the global search box to both Experience Builder and Salesforce Tabs + Visualforce sites.

Note: You are automatically redirected to a Classic UI, when configuring this feature in an Experience Builder site.

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

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

2. Replace *<site name>* with the unique value you used for the URL when creating the Experience Cloud site.

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

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

With global search from your internal org, you can get uneven results when searching for an Experience Cloud site User record. Here's why and what you can do about it. Each site has a unique network ID. When you create a user through **Contact record** > **Create External User**, the new User record is assigned to a site's network ID.

Global search looks for records in the internal org, which has a different network ID than the site. A global search doesn't search inside sites. Since the User record is associated with a site network ID, global search doesn't return results for that record.

The workaround is to create User records in the internal org, and then associate the records to a site. You can associate an internal User record to a site by linking the internal record to a Contact record. After you forge the link, you can find the User record through global search. The User record's network ID is now associated with the internal org.

Choose a Landing Tab

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

In Experience Workspaces, go to **Administration** > **Tabs**. The first tab in the Selected Tabs list is the landing page.

There are multiple options for the landing tab in your site, 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 sites where people 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 org is the first thing members see when they log in. The components that display on the tab were added to the Home Page by your admin. 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.

SEO for Experience Builder Sites

Search engine optimization (SEO) ensures that your public Experience Cloud site is visible to search engines, and helps customers, partners, and visitors find your content via online search.

Before you set up SEO for your Experience Builder site, make sure you understand the following concepts.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

Location of Your Experience Cloud Site

For search engines, such as Google™ or Bing®, your site must be at the root level. To determine the location of your site, from Setup, enter *`Digital Experiences`* in the Quick Find box, and click **All Sites**. Then, check the address in the URL column.

The address for a root-level site has the format `https://`*`site_URL`*. A site that isn't at the root level commonly has a URL with a path prefix in the format `https://`*`site_URL/sub_path/`*.

If your site has a URL prefix, meaning it's not at the root level, you must create a root site. You submit the sitemap for the root-level site to search engines first, and then submit the URLs for the site with a path prefix.

The `robots.txt` File

The industry standard `robots.txt` file informs search engine spiders and bots about which areas of your site to index. The `robots.txt` file for your site is automatically generated and allows your entire site to be indexed. The `robots.txt` file is at the root level of your site and is unique for each domain. Therefore, sites that share a domain also share a `robots.txt` file. Conversely, sites available on multiple domains, meaning *.force.com, *.my.site.com, and custom domains, have different default `robots.txt` files.

To view the `robots.txt` file, navigate to `https://<community_URL>/robots.txt`. The `robots.txt` file uses include (Allow) and exclude (Disallow) directives to inform spiders and bots about which areas of your site to index. Only relative URLs are valid for the Allow and Disallow directives.

Page Indexing

When you make your site public, search engines can then index all the pages of your site. However, if you don't want search engines to index certain pages, you can:

- Make a page private. Use this method to make the page unavailable to both guest users and search engines.
- Use the `noindex` meta tag. This tag prevents search engines from showing the page in search results, but allows guest users to view the page.
- Create a custom `robots.txt` file. The `robots.txt` file is a rules-based approach to control the visibility of specific areas of your site to search engines. Guest users can still view pages that you don't want indexed.

By default, objects displayed on a page are private and can't be indexed until you explicitly make an object and its associated fields available to search engines.

The Sitemap

The `sitemap.xml` file for your site contains a list of the public pages and the objects and fields with read access in the guest user profile. Search engines use the sitemap as a starting point to discover which information from your site is available for crawling and important content to index. The sitemap is at the root level of your site. To view the `sitemap.xml` file, navigate to `https://<site_URL>/s/sitemap.xml`.

If your org supports multilingual Knowledge articles, the sitemap includes an entry for each supported language, based on Google's recommended format.

The sitemap is automatically generated once a week. It's generated the first time on the following Sunday, and then regenerated every Sunday thereafter. The `sitemap.xml` file is only available in production orgs.

IN THIS SECTION:

Provide Search Engines with Fresh Content Snapshots

Salesforce takes a snapshot of your site's publicly available content every 15 days. This period works well for most updates. But let's say you update a page's content with important, time-sensitive information, such as price changes for a flash sale. Instead of waiting for the automatic update, you can take a snapshot every 24 hours to refresh the page content served to search engines.

Generate a Manual Sitemap Refresh for Your Experience Cloud Site

When you go live with a new Experience Cloud site or make significant updates to an existing one, you can now generate a manual sitemap once every 24 hours outside of the weekly automatic sitemap refresh.

Best Practices and Tips for Using SEO in Your Experience Cloud Site

Follow these guidelines and best practices when optimizing SEO in your site.

SEO for Experience Cloud Sites FAQ

Answers to common questions about using SEO in your Experience Cloud site.

SEE ALSO:

Blog Post: Advanced SEO for Lightning Communities

SEO Best Practices and Considerations for Guest Users

Set Up Federated Search in Experience Cloud Sites

Salesforce Security Guide: Field-Level Security

Set Up Your Experience Builder Site for SEO

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

Setting up SEO for your Experience Builder site includes a series of tasks you perform in Salesforce and in the site itself. From identifying your preferred domain to determining which objects to make public, we've got you covered.

Here's an overview of the main steps to take to set up SEO for your site.

1. If you have multiple domains, identify your preferred domain.

   Tip: Identify your preferred domain before you make your site public. If the site is made public without a preferred domain, the *.force.com or *.my.site.com URLs are also indexed, and removing them from search results can take time.

2. Make your site public.

   The SEO settings tab in Experience Builder is available only if your site is public.

   When you make your site public, search engines can then index the pages of your site. However, if you don't want unauthenticated visitors or search engines accessing certain pages, you can make those pages private. Also, more granular indexing control is available at the object and field levels.

3. To improve search results, specify the SEO properties for individual pages. These SEO properties are for the title and description that appear in the search results of indexed pages, and to prevent a page from being indexed.
4. Optionally, for a rules-based approach, create a custom robots.txt file to control the indexing of specific areas of your site.
5. If you want the information stored in objects accessible to search engines, make objects and their associated fields readable.
6. Activate your site to successfully implement SEO.

   Before activating your site, check the guest user profile to ensure that the correct objects have read access. This best practice controls the scope of your sitemap.xml file and keeps your site secure.

7. To make your changes live, publish your site.
8. If you're setting up SEO for the first time, or as needed, generate a manual sitemap refresh.

   An automatic weekly sitemap refresh takes place every Sunday. You can also generate a manual sitemap refresh once every 24 hours.

9. If necessary, provide search engines with fresh content snapshots.

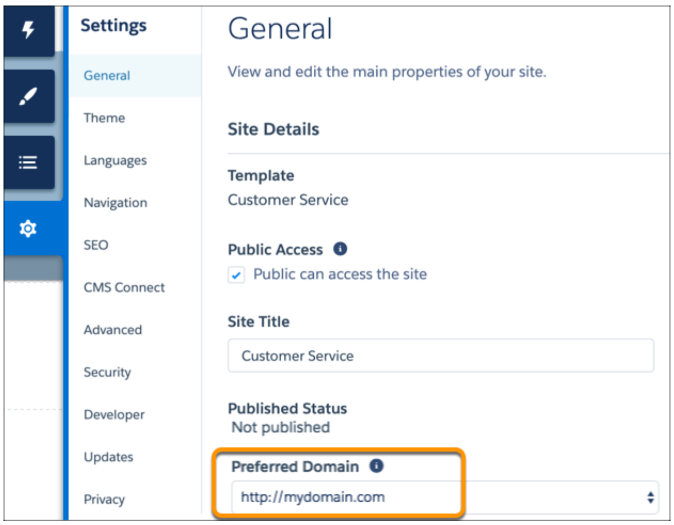
   By default, Salesforce takes a snapshot of your site's publicly available content every 15 days. This period works well for most updates. But if you updated a page with important, time-sensitive content, you can take a snapshot every 24 hours to refresh the page content served to search engines.

Identify Your Preferred Domain to Improve SEO Results

By default, your site is available on the *.my.site.com or *.force.com domain, but you can add a custom domain so that your site URLs reflect your company brand. However, multiple domains for the same site, meaning *.my.site.com, *.force.com, and custom domains, can dilute search engine results and lower page ranking. If you have multiple domains, identify which domain to use for crawling and indexing your site's pages.

Tip: The Preferred Domain setting appears in Experience Builder only if you have multiple domains that are associated with your site.

1. In Experience Builder, go to **Settings** > **General**.
2. Select your preferred domain.



Note:

- Make sure that you configure your preferred domain before submitting the sitemap to a search engine. After your site is public, the search engine shows all the custom URLs that you added to the sitemap.
- You can set only HTTPS preferred domains.

SEE ALSO:

Add a Custom URL

Configure a Custom Domain for Your Experience Cloud Site

Generate a Manual Sitemap Refresh for Your Experience Cloud Site

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

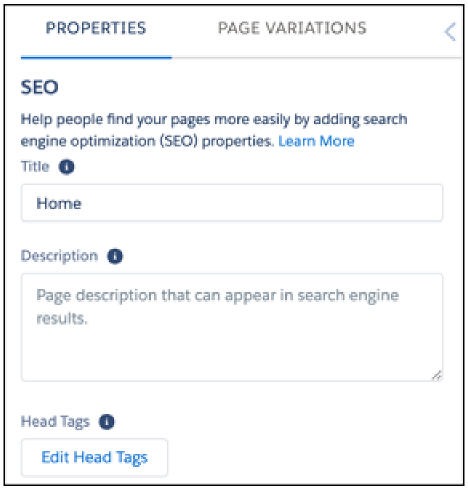
SEO Page Properties

Set the title, description, and head properties for your Experience Builder site pages to improve search results.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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



Title

The title of the page. Shown in search engine results, the browser's tab or window title, and bookmarks.

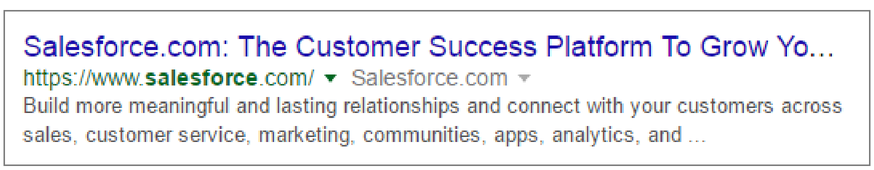
For data-based pages such as record and content pages, the title is set dynamically.

Description

The description of the page. Shown in search engine results to help users decide if it's the page that they want.

For data-based pages such as record and content pages, the description is set dynamically.

If a page's `description` value is empty, search engines populate the description from the first text they find.



Head Tags

The Edit Head Tags option lets you enter specific `head` tags for the page to assist search engine optimization.

For data-based pages such as record and content pages, you can enter expressions to access values from the record associated with the page, such as the name, title, and value of specific fields.

Or, to prevent search engines from indexing a page, add the `noindex` tag.

```
<meta name="robots" content="noindex">
```

You can also specify local `head` tags for individual site pages, for example to indicate a non-canonical page. And you can augment any global tags that are in your `head` markup.

Tip: Or you can take a rules-based approach to controlling the visibility of specific areas of your site to search engines by creating a custom `robots.txt` file.

Dynamic SEO Page Properties

For Record or CMS Content pages with dynamic data, for example from a database or ever-changing inventory, to make these pages discoverable, provide the title and identify which object it comes from. Use expressions to dynamically update the page title, description, and meta tags based on the changing content. The expressions differ depending on the page type. For Record pages, the Expression Language (EL) starts with {@Record.}. For Content pages, the EL starts with {!Content}. Null field values are returned as empty strings. Output appears in the appropriate language, if available.

Some object pages with dynamic data don't affect SEO and aren't indexed, such as Messages. So those page properties don't include fields for title or description.

Most standard fields are accessible to a guest user by default. To ensure access, confirm that Public Access is enabled in the Experience Builder settings so that the Guest User profile has access to the fields displayed. Custom fields are enabled for the Guest User profile through field-level security (FLS) settings before they can be used in expressions. If any queried field is restricted by profile or FLS, the entire record doesn't load and your expressions don't render on the page.

You can use these expressions only in the SEO section of the Experience Builder Pages Properties tab.

Note: Notice that the Object and Title expressions look a little different than usual? Use them as they appear, they work fine. They're unique for this area of Salesforce.

To implement dynamic properties for the `PageType Record`:

Expression	Description
{!Record._Object}	Returns the display name of the object.
{!Record._Title}	Returns the title of the record as defined in the name field. Keep in mind that the name field can have a different label than Name.
{!Record.*FieldName*}	The value of the specified field for the record. The field name is case-sensitive and includes `__c` for custom fields. For example, show a record's type and title in search results using `{!Record.recordTypeLabel}.{!Record.title}`.

For example, you can display the object name of a record followed by its title: `{!Record._Object}: {!Record.title}`. Or add a specific field, such as `{!Record.Description}`.

For the CMS `Content` *`PageType`*, implement dynamic properties using these expressions:

Expression	Description
{!Content.contentTypeLabel}	Returns the display name of the object.
{!Content.title}	Returns the title of the content as defined in the name field. Keep in mind that the name field can have a different label than Name.
{!Content.*FieldName*}	The value of the specified field for the content. The field name is case-sensitive and includes `__c` for custom fields. For example, for a blog post, use {!Content.Body.Title}.

For example, `{!Content.title}.{!Content.lastModified}` displays the Content page's title and last modified date.

Canonical URL Tags

Choose a canonical URL to consolidate a single page that uses multiple URLs or different pages with similar content. Improve SEO and direct search bots to the most representative page from a set of duplicate pages on your site. Without canonicalization, search engines consider all of your identical or similar URLs as unique pages, which can cause several SEO issues.

- Search engines can miss your unique content.
- Too much duplicate content can dilute content ranking.
- Ranked content doesn't reflect the best URL.

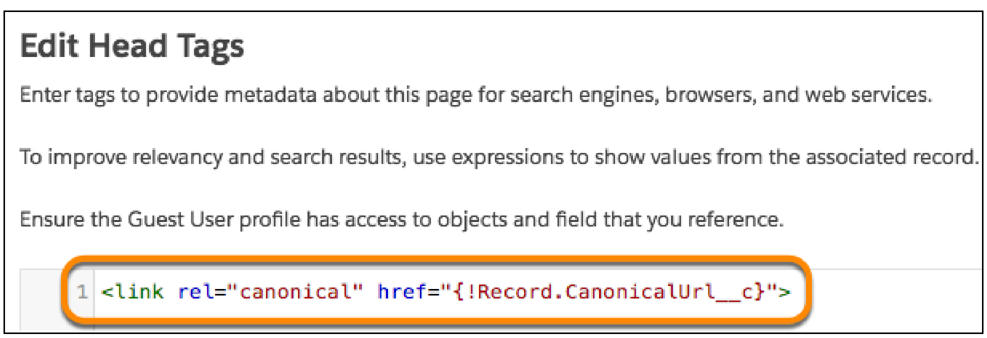
To set up a canonical URL for a standard page, open the Experience Builder Page Properties tab. Select the SEO tab, then **Edit Head Tags**. Enter the properties as shown with your canonical URL.

```
<link rel="canonical" href="https://mysite.com/s/canonicalURL">
```

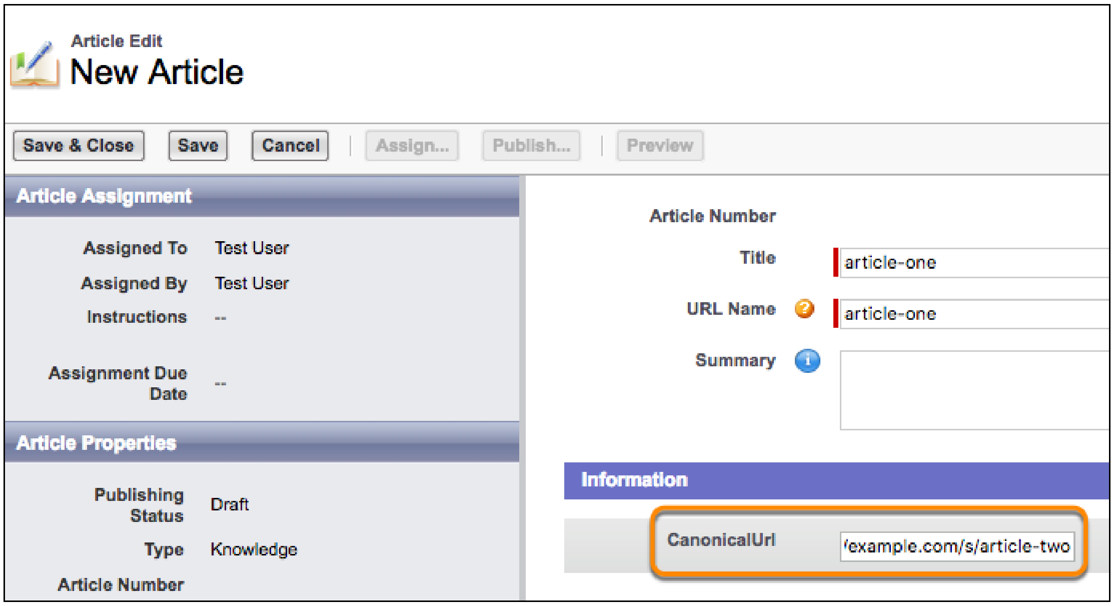
For Record pages with dynamic data, we recommend that you create a custom field for the object to store the canonical URL. For more information on dynamic pages, see Dynamic SEO Page Properties on page 114.

1. To create a custom field, select **Setup** > **Object Manager** > **Fields & Relationships**. In the New Custom Field page, select URL. In the Field Label and Field Name fields, enter `CanonicalURL`.
2. Most standard fields are accessible to a guest user by default. To ensure access, confirm that Public Access and field-level security (FLS) is enabled so that the Guest User profile has access to the fields displayed. For more information, see Make Objects Available for SEO on page 118.
3. Open the Experience Builder Page Properties tab. Select the SEO tab, then **Edit Head Tags**. To set the canonical URL, use the expression for new field you created.

   ```
   <link rel="canonical" href="{!Record.CanonicalURL__c}">
   ```

4. In the Record properties, enter the URL in the custom CanonicalURL field.



Note: Question and Topic objects don't currently support Canonical URLs.

SEE ALSO:

- Page Properties and Types in Experience Builder
- Add Markup to the Page <head> to Customize Your Experience Builder Site
- Control Public Access to Your Experience Builder Sites
- https://help.salesforce.com/articleView?id=cms_customcontenttype-detailpage.htm&type=5

Create a Custom `robots.txt` File for Your Experience Cloud Site

USER PERMISSIONS

To create a Visualforce page and robots.txt file for your site:

- Create and Set Up Experiences

The `robots.txt` file for your site is automatically generated. It allows your entire site to be indexed. However, if you want to hide certain pages of your public site from search engines, you can create a custom robots.txt file.

Available in: Salesforce Classic and Lightning Experience

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

You create a custom `robots.txt` file using a Visualforce page. You then add the URLs of the pages you want indexed to the Allow section. And add the URLs you don't want indexed to the Disallow section. A common way to use a custom `robots.txt` file is to disallow your entire site and then selectively allow individual pages to be indexed.

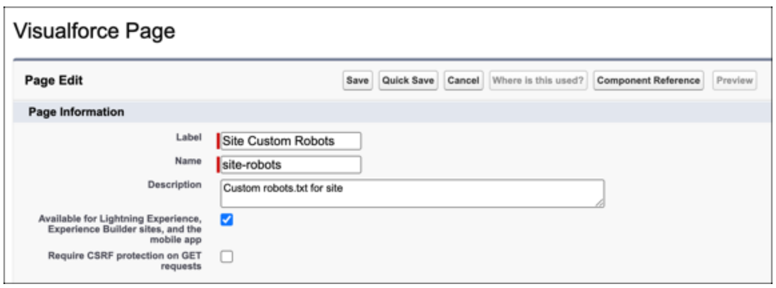
```
Disallow: /   # hides everything from ALL bots
Allow: /<path-prefix-1>/s  # add path you want to open to bots
Allow: /<path-prefix-2>/s  # add path you want to open to bots
Sitemap: http://<site_URL>/s/sitemap.xml
```

Tip:

- If you have more than one site, each with a different custom domain subpath, they share the same `robots.txt` file. Therefore, when you create a custom `robots.txt` file, ensure that your indexing directives account all pages in all your sites.
- An alternative way to hide public pages from search results is to use the page's noindex tag.

1. In a text file, create a list of include (Allow) and exclude (Disallow) directives for the areas of your site that you want to expose to or hide from search engines. Also include the path to all sitemaps for the domain—for example, `https://`***<site_URL>***`/s/sitemap.xml`.

   Only relative URLs are valid for Allow and Disallow directives.
2. To create a Visualforce page, in Setup, enter *`Visualforce Pages`* in the Quick Find box. Then select **Visualforce Pages**, and click **New**.
3. Give the custom file a name. You can even call it `robots`.



4. Select **Available for...Lightning Experience**.
5. Copy your list of indexing directives and the sitemap path from the text file to the Visualforce page. For example:

```
<apex:page contentType="text/plain">
    User-agent: *
    Disallow: /
    Allow: /s
    Allow: /mycommunity/s
    Sitemap: https://example.com/s/sitemap.xml
    Sitemap: https://example.com/mycommunity/s/sitemap.xml
</apex:page>
```

6. Click **Save**.

   The Visualforce page is automatically saved at the root-level of the preferred domain.
7. From Experience Workspaces, click **Administration** > **Administration** and click **Go to Force.com**. Then click **Edit** on the Site Details page.
8. In the Site Robots.txt field, enter the name of the Visualforce page you created, or click to search for the file.
9. Click **Save**.

SEE ALSO:

Best Practices and Tips for Using SEO in Your Experience Cloud Site

SEO for Experience Cloud Sites FAQ

Make Objects Available for SEO

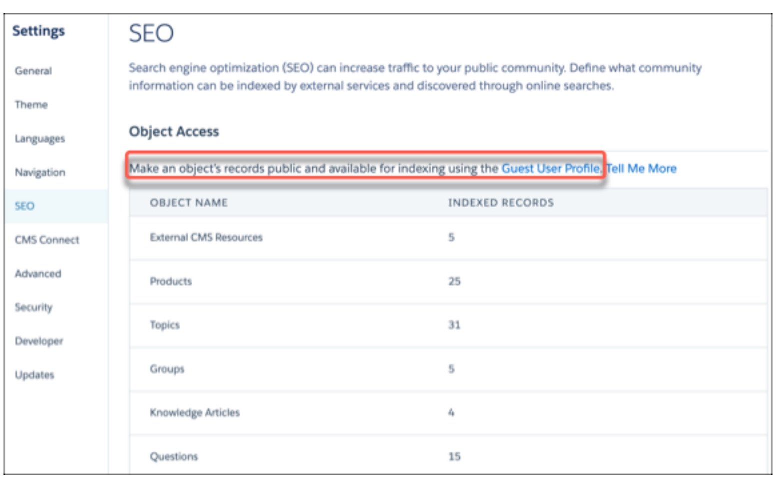
When you make your site public, search engines can index the pages of your Experience Cloud site. However, to ensure that you don't expose sensitive data, the data displayed by objects on those pages aren't public. Instead, you must specifically make those objects and their associated fields publicly available for indexing by search engines.

The guest user profile controls what unauthenticated users and search engines can see in a publicly available site. To make a standard or custom object's records available for indexing, provide Read access to that object and its fields. Every instance of that object, regardless of page location, is added to the sitemap.

Note:

- To ensure that object data is available to search engines, review the sharing rules, field-level security (FLS), and permission sets assigned to an object. Even though an object and its fields are public, Salesforce security settings still determine guest user access to this data.
- Ensure that all sensitive objects are private, even objects used in private pages that aren't included in the sitemap. All public pages and public objects are discoverable because search engines use the sitemap only as a starting point to identify which site content is available for crawling.
- Regularly review and update the objects and records that are public through your guest user profile. This best practice controls the scope of your sitemap and helps keep your site secure.

1. For Topics, Feed Items, and Questions pages, enabling object read access or creating a sharing rule isn't required. Instead, to allow access:
   a. In Experience Workspaces, select **Administration**.
   b. On the Preferences page, select **Give access to public API requests on Chatter** and **Let guest users see other members of this site**.
   c. Save your changes.
2. For standard and custom objects, configure which objects are public using the guest user profile:
   a. In Experience Builder, select the SEO setting tab.
   b. Click **Guest User Profile**.



EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR
- Be a member of the site AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

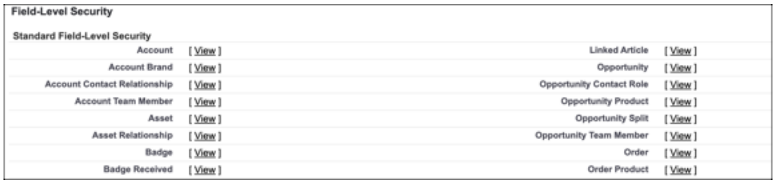
  OR
- Be a member of the site AND an experience admin or publisher in that site

c. Click **Edit**, and in the Standard Object Permissions section, give at least read access to the object.

d. Save your changes.

3. Ensure that the appropriate object fields have read access using the guest user profile:

a. In the Field-Level Security section, click **View** beside the relevant object.

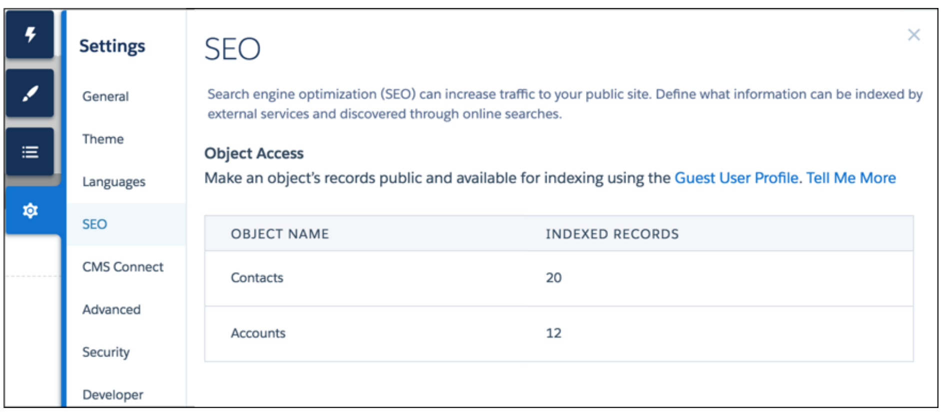


b. Save your changes.

4. Create a sharing rule for guest users for each public object.

Warning: Sharing rules allow immediate and unlimited access to all records matching the sharing rule's criteria. To secure your Salesforce data and give your site guest users access to what they need, consider all the use cases and implications of creating a sharing rule.

5. To make your changes live, publish your site.
It can take up to 24 hours for the list of available objects to appear along with the number of indexed records.



SEE ALSO:

Secure Guest Users' Sharing Settings and Record Access

SEO Best Practices and Considerations for Guest Users

Configure the Guest User Profile

Provide Search Engines with Fresh Content Snapshots

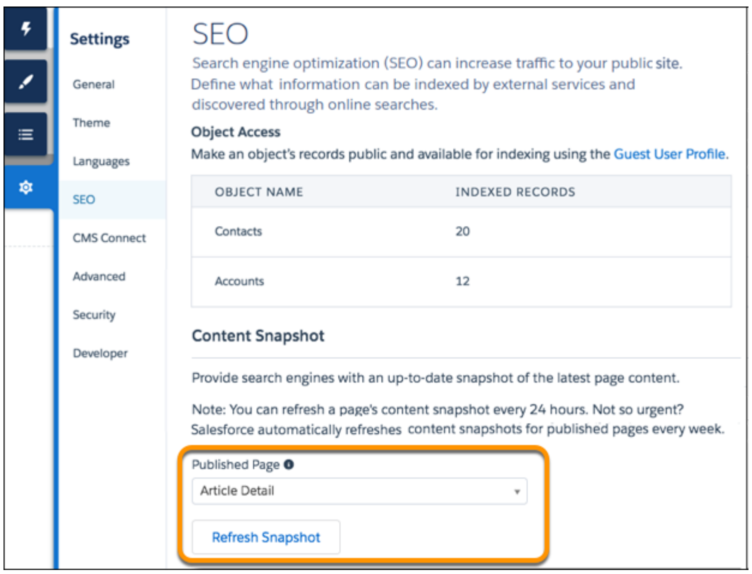
Salesforce takes a snapshot of your site's publicly available content every 15 days. This period works well for most updates. But let's say you update a page's content with important, time-sensitive information, such as price changes for a flash sale. Instead of waiting for the automatic update, you can take a snapshot every 24 hours to refresh the page content served to search engines.

Tip: The Content Snapshot section appears in Experience Builder only after you set a preferred domain for your Experience Builder site and ensure that your site is publicly available.

1. In Experience Builder, update the page's content, and then publish your site to make your changes live.

   You can only take snapshots of published pages.

2. On the SEO settings tab, select the page in the Published Page dropdown.



3. Click **Refresh Snapshot**.

SEE ALSO:

Best Practices and Tips for Using SEO in Your Experience Cloud Site

Generate a Manual Sitemap Refresh for Your Experience Cloud Site

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

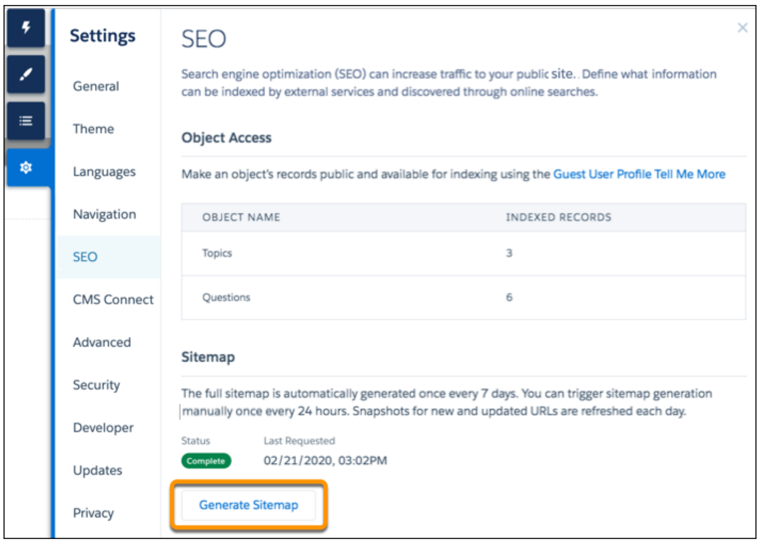
- Be a member of the site AND an experience admin or publisher in that site

Generate a Manual Sitemap Refresh for Your Experience Cloud Site

When you go live with a new Experience Cloud site or make significant updates to an existing one, you can now generate a manual sitemap once every 24 hours outside of the weekly automatic sitemap refresh.

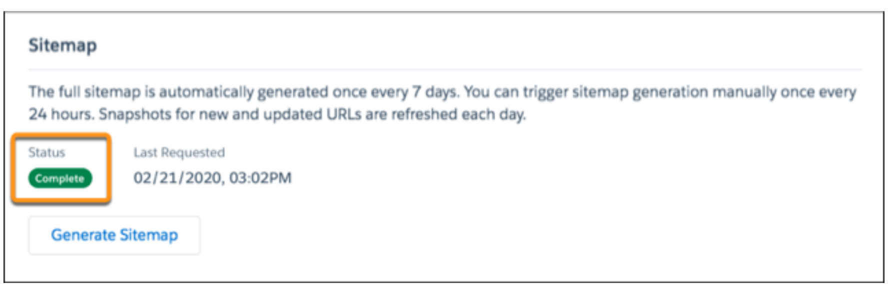
To initiate a manual refresh of your sitemap once every 24 hours:

1. In Experience Builder, navigate to the SEO tab in settings.
2. Click the **Generate Sitemap** button to manually generate a sitemap for your site.



3. Track the status of the sitemap as it processes.

   The status bar shows **In Progress** while the sitemap generates. After your sitemap is generated, the status updates to read **Complete**.



Tip: For the best possible experience, perform a manual sitemap generation at an off-peak time without making any changes in Builder.

EDITIONS

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

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

When you add new pages to your site, these links are included in an automatic partial sitemap refresh every 24 hours. If you add new pages after you manually generate a sitemap, they are added to the sitemap automatically.

SEE ALSO:

Provide Search Engines with Fresh Content Snapshots
Create a Custom robots.txt File for Your Experience Cloud Site
Configure a Custom Domain for Your Experience Cloud Site

Best Practices and Tips for Using SEO in Your Experience Cloud Site

Follow these guidelines and best practices when optimizing SEO in your site.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

General SEO Best Practices

- Locate a site at the root level. To determine the location of your site, from Setup, enter `Digital Experiences` in the Quick Find box, and click **All Sites**. Then, check the address in the URL column. The address for a root-level site has the format `https://site_URL`. A site that isn't at the root level commonly has a URL with a path prefix in the format `https://site_URL/sub_path/`.

  If your site has a URL prefix, meaning it's not at the root level, you must create a root site. You submit the sitemap for the root-level site to search engines first, and then submit the URLs for the site with a path prefix.

- If your org supports multilingual Knowledge articles, keep the same URL as the base language article. We don't recommend replacing the URLs of translated articles with language-specific URLs.
- To improve search results and help people decide whether it's the page they want, use a page's Title and Description properties.

  Note: You can use other `head` markup global tags to configure your social media tags from OpenGraph to Twitter. We restrict the tags, attributes, and values allowed in the `head` markup of your pages to improve security.

- To make the object page URL more readable for humans, change the page's base URL. Update all other references to your pages, such as object, detail, list, or related list, that you hand-coded from other pages or from links outside your site. These references aren't automatically updated.
- Pages with non-standard URLs, such as URLs that include query string parameters, aren't included in the sitemap or content snapshots. As a result, search engines can't crawl or index these pages. Therefore, avoid using standard pages to deliver dynamic data via URL parameters (`/s/product?productId=12345`). Instead, use object pages for the record pages to be crawled (`s/product/12345`).
- When creating a custom Aura component that generates a URL or navigates to a page, use `lightning:navigation` to generate proper `<a href>` links. Similarly, for custom Lightning web components, use `lightning-navigation`.
- 301 redirects ensure that users and search engines are directed to the correct page. For example, for a URL such as `www.my_site.com`, we recommend creating a redirect to `my_site.com`. You can set up these redirects with your DNS provider.
- To indicate that a page is a duplicate of another page, add a `<link>` element, with the attribute `rel=canonical` and point to the canonical page. For example, `<link rel="canonical" href="https://example.com/home"/>`. This action ensures that search engines crawl the canonical page and not a duplicate page.

Sitemap and `robots.txt` Files

- Don't create a custom sitemap. Custom sitemaps are difficult to maintain and scale. Instead, use the automatically generated `sitemap.xml` file.
- If you create a custom `robots.txt` file, it must include the paths to all sitemaps for the domain.

Data Security

- Regularly review and update the objects and records that are public through your guest user profile. This best practice controls the scope of your sitemap and helps keep your site secure.
- To ensure that object data is available to search engines, review the sharing rules, field-level security (FLS), and permission sets assigned to an object. Even though an object and its fields are public, Salesforce security settings still determine guest user access to this data.
- Ensure that all sensitive objects are private, even objects used in private pages that aren't included in the sitemap. All public pages and public objects are discoverable because search engines use the sitemap only as a starting point to identify which site content is available for crawling.

Testing and Validation

- Review the accuracy of your `sitemap.xml` file before submitting it to search engines. Navigate to `https://<site_URL>/s/sitemap.xml` as an unauthenticated user. We suggest using Google Chrome's incognito mode. Ensure that the URLs listed in the site map are appropriate for guest users.

  Note: If a URL is mistakenly included in the sitemap, check that the correct permissions are enabled on the guest user profile and that your site is set up correctly for SEO.

- Many webmaster tools require verification of your site. One of the best ways to verify that your site is to add the meta tag provided by the webmaster tool to your `head` markup.
- Salesforce is a single-page application (SPA). So if you plan to use any third-party SEO tools to test your community, make sure that they're configured to crawl JavaScript-based sites properly.
- Check SEO performance and site speed using the free Salesforce Community Page Optimizer plug-in for Chrome.

SEE ALSO:

Blog Post: Advanced SEO for Lightning Communities

SEO for Experience Builder Sites

SEO Best Practices and Considerations for Guest Users

SEO for Experience Cloud Sites FAQ

SEO for Experience Cloud Sites FAQ

Answers to common questions about using SEO in your Experience Cloud site.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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Can I create a custom sitemap?

Don't create custom sitemaps, as they're difficult to maintain and scale. Instead, use the automatically generated `sitemap.xml` file.

How often is the sitemap generated?

If a site has been published, is active, and is public, the sitemap is automatically updated once a week, on Sunday. You can manually regenerate a sitemap once every 24 hours.

Can I manually generate a sitemap for my site?

If you go live with a new site or make significant changes to an existing site, you can manually generate a sitemap.

Tip: For the best possible experience, perform a manual sitemap generation at an off-peak time without making any changes in Builder.

Why does the sitemap have references to other sitemaps?

The `sitemap.xml` file can contain only a limited number of URLs. For large sites, the sitemap is partitioned into multiple smaller sitemaps. These partitions organize the different public pages and objects in your site. Each partition is of the form `sitemap-`*`object`*`-#.xml`.

Does the sitemap include URLs for object pages?

If an object's detail page is public and you enable read access for the object, the URL for the detail page is included in the sitemap. You can make an object's list page public separately and include it in the sitemap by adding the page to the Navigation menu and then republishing your site. Related list pages are never included in the sitemap.

Why don't I see the automatically generated `robots.txt` file when I navigate to `https://`*`<site_URL>`*`/robots.txt`?

Your site must be at the root level of your custom domain for the `robots.txt` file to appear. If you don't have a custom domain set up and you're using the `*.force.com` or `*.my.site.com` domain, then a site without the path prefix must exist.

How do I change the indexing directives of the default `robots.txt` file?

You can create a custom `robots.txt` file to implement a rules-based method to control the visibility of specific areas of your site to search engines.

Can I remove the `/s/` from the default site URL?

No, the `/s/` is required in the default site URL.

Does each article have its own URL?

Yes, each article that appears in the Article Detail page has its own URL, which is retrieved from the Knowledge article's `URL Name` field.

Article URLs use the format *`/article/:urlName`*. However, the article's *`recordId`* is available for use with components on the Article Detail page, like the Article Content component. The *`recordId`* on the page is set to the most recent Knowledge Article Version ID for a published article, uniquely defined by the URL Name and, if present, the translation language.

Tip:

- If your org has custom components that rely on the article's `urlName`, update the components to use `recordId` instead.
- If your org supports multilingual Knowledge articles, keep the same URL as the base language article. We don't recommend replacing the URLs of translated articles with language-specific URLs.

Can I update the title and add a description to articles to improve search engine results?

Each Knowledge article has a `URL Name`, a `Title`, and a `Summary` field. When the article's displayed in the Article Detail page in Experience Builder, these fields are used for the page URL, the `title`, and `description` tags on the page `<head>`.

Are pages with non-standard URLs, such as custom vanity URLs or URLs that include query string parameters, supported for SEO?

No, pages with non-standard URLs aren't included in the sitemap or content snapshots. Therefore, search engines can't crawl or index those pages.

For example, instead of using standard pages to deliver dynamic data via URL parameters (`/s/product?productId=12345`), use object pages for the record pages to be crawled (`s/product/12345`).

How do I indicate that a version of a page is non-canonical?

When different versions of a page exist, search engines crawl only the canonical version of a page. Stop the search engine from arbitrarily choosing a URL as the canonical version of multiple pages, by indicating that a page is a duplicate of another page (that is, non-canonical). To do so, add a `<link>` element, with the attribute `rel=canonical` and point to the canonical page. For example, `<link rel="canonical" href="https://example.com/home" />`.

How are non-canonical URLs for object pages handled?

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

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

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

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

To create a user-readable URL for the detail page of a standard or custom object, we append the value of the object's Name field to the URL. For example, for AW Computing's Account Detail page, we redirect `https://mysite.com/s/account/001R0000002NzuaIAC` to `https://mysite.com/s/account/001R0000002NzuaIAC/aw-computing`.

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

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

How do I get analytics for material that is brought in using CMS Connect?

Remember, the content you display in your site when using CMS Connect (JSON) doesn't live in your site. Getting usage data requires a few extra steps.

Configure External Objects for the data that you're interested in tracking using Salesforce Connect or OData, Salesforce Reporting.

SEE ALSO:

SEO for Experience Builder Sites

Best Practices and Tips for Using SEO in Your Experience Cloud Site

Best Practices and Considerations for Page-Level Access in Experience Builder

Customize Login, Self-Registration, and Password Management for Your Experience Cloud Site

Configure the default login, logout, password management, and self-registration options for your site. Or customize the behavior with Apex and Visualforce or Experience Builder (Site.com Studio) pages. You can also use dynamic URLs to brand your pages at run time.

By default, each site comes with default login, logout, password management, and self-registration pages. Salesforce also includes associated Apex controllers that drive this functionality under the hood. You can use Experience Builder or Visualforce to create custom branding and change the default behavior.

Warning: When you customize a login page or any page that includes fields with sensitive or confidential information with Experience Builder, we recommend that you use only standard components built by Salesforce or components that you built, customized, or vetted. Use of third-party components and code libraries on a page that includes fields with sensitive or confidential information can increase your risk for security vulnerabilities.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

IN THIS SECTION:

Brand Your Experience Cloud Site's Login Page

You can brand the default login page that comes with your site. For example, you can use your own logo, change background colors, add a custom footer, and even change the content on the right side of the login page.

Create Dynamic Branding URLs

You can use dynamic branding to customize your Experience Cloud site's login experience at run time. For example, you can change which logo to display depending on whether the user is an employee or customer. Or display a particular self-registration page based on the user's country code.

Customize Your Experience Cloud Site's Login Experience

Customize your site's login experience—the experience that external users embark on when they log in to your site—from the Administration Login & Registration page. You can customize the default login page or the page you create with the Experience Builder or Visualforce. For example, you can choose which login page to use, allow internal users to log in directly to your site, and set up support for multiple authentication providers and single sign-on.

Redirect Members to a Custom URL on Logout

When Experience Cloud site members log out, they're taken to your site login page by default. You can choose to redirect them to a different location, such as your company website. Specify the URL to which site members are redirected when they log out from your site.

Use Custom Change Password and Forgot Password Pages in Your Experience Cloud Site

You can customize Forgot Password and Change Password pages from the Experience Workspaces Administration Login & Registration page. Or you can create custom password pages in Visualforce. You can also customize the default password templates in Visualforce.

Set Up Self-Registration for Your Experience Cloud Site

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

Customize Code for Lightning Components on Login Pages

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

Brand Your Experience Cloud Site's Login Page

You can brand the default login page that comes with your site. For example, you can use your own logo, change background colors, add a custom footer, and even change the content on the right side of the login page.

Note: You can specify dynamic branding URLs so that the login page is different depending on who logs in and from where.

1. From Setup, enter `All Sites` in the Quick Find box, then click **All Sites**.
2. Next to the name of your site, click **Workspaces**.
3. Select **Administration**, and then select **Login & Registration**.
4. To change the logo, select whether the image is a file or URL.
   a. If you're using a file, choose the logo from your file system.

      You can use a GIF, JPG, or PNG file up to 100 KB. The image dimensions can be up to 250 px by 125 px.

      When you upload a logo, it is saved in a Communities Shared Document Folder on the Documents tab. You can't delete this folder.
   b. If you're using a logo at a fixed URL, enter the location.
   c. If you're using different logos for dynamic branding, create a URL with the dynamic experience ID parameter *{expid}*, for example, `https://universaldistributing.com/{expid}_logo.png`. The admin modifies the login URLs to pass the expid signal. When a user logs in, the value replaces the *{expid}* portion of the logo URL, for example, `https://universaldistributing.com/internal_logo.png`.
   d. If you create dynamic logos and right-frame URLs, modify your login implementation to direct the user to the appropriate login URL based on the run-time situation.

   Your logo appears in the top left of the login page.
5. Select the background color of the login page.
   The color you choose appears as the background on the left side of the login page.
6. Enter the right-frame URL to the right-side content of the login page.

   The right-frame URL can be fixed or dynamic. A dynamic URL works the same as a dynamic logo.
   a. If the right-frame content is a fixed URL, enter the location.
   b. If the right-frame content is dynamic, create a URL with the *{expid}* experience ID parameter.

   An inline frame (iframe) is created on the right side of the login page to display the content specified in the URL.
7. Enter your text for the site login page footer, up to 120 characters.

   The default login page displays a footer at the bottom. If you're creating a custom login page, create your own footer.
8. Click **Save**.

The login page appears to all internal users, customers, partners, and guests according to the branding you choose. Behind the scenes, you (or your developer) update your login implementation to specify how to pass the *{expid}* value to the login URL. For example,

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To create an Experience Cloud site:
- Create and Set Up Experiences AND View Setup and Configuration

To customize an Experience Cloud site:
- Be a member of the site AND Create and Set Up Experiences

  OR
- Be a member of the site AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:
- Be a member of the site AND Create and Set Up Experiences

  OR
- Be a member of the site AND an experience admin or publisher in that site

add logic to your login button so that when `expid = INTERNAL`, the login button redirects the user to the login URL `https://universaldistributing.com/brands/expid=INTERNAL`.

SEE ALSO:

Customize Login, Self-Registration, and Password Management for Your Experience Cloud Site

Create Dynamic Branding URLs

Customize the Default Login Process with Apex

Create Dynamic Branding URLs

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

You can use dynamic branding to customize your Experience Cloud site's login experience at run time. For example, you can change which logo to display depending on whether the user is an employee or customer. Or display a particular self-registration page based on the user's country code.

When using dynamic branding to customize the login experience, it applies to the entire login process: the initial login page plus related pages, such as multi-factor authentication (MFA) or a login flow. You can add dynamic branding to Experience Builder, Visualforce, and custom login pages.

Use dynamic URLs for your login pages to present a different look and behavior based on the run-time situation. For example, different logos appear according to who the user is or where the user's logging in from. Dynamic branding relies on a URL parameter called the experience ID. The *`{expid}`* determines what the user experiences. At run time, the *`{expid}`* resolves to the current value, and the appropriate URL is created.

Here's a scenario. Universal Distributing wants to brand the login experience depending on whether the user is internal or external. You create logos for each brand, appropriately named `internal_logo.png` `external_logo.png`. Then you set the logo URLs so that internal users see `http://.../internal_logo.png` and external users see `http://.../external_logo.png`.

From the Administration Login & Registration page, you specify the logo URL with the *`{expid}`*: `https://universaldistributing.com/`*`{expid}`*`_logo.png`.

When an external user logs in, *`{expid}`* is set to external, the URL becomes `https://universaldistributing.com/external_logo.png`, and the external logo appears on the login page. Likewise, when an internal user logs in, *`{expid}`* is set to internal, the URL becomes `https://universaldistributing.com/internal_logo.png`, and the internal logo appears on the login page.

You define dynamic branding URLs for logos and right-frames on the Experience Workspaces Administration Login & Registration page. They apply to default and custom login pages.

In addition to setting the experience ID, your login implementation must set the login URL according to the value of the experience ID. For example, by adding the logic to your login button, when `expid=INTERNAL`, the login button directs the user to `https://universaldistributing.com/brands/expid=INTERNAL`.

You can also use Visualforce and Apex to create dynamic URLs. Use the Apex `getExperienceId` method of the `System.Site` class to retrieve the value of the experience ID. To set the experience ID, use the `setExperienceId` method, or add an experience ID dynamic parameter to one of these login endpoints.

For example, use the `CommunitiesSelfReg` endpoint to pass in a different *`{expid}`* value to the self-registration page to deliver a different registration flow for each brand.

- ***`site-url`***`/services/oauth2/authorize/expid_`***`value`***
- ***`site-url`***`/idp/endpoint/HttpPost/expid_`***`value`***

- ***site-url***/idp/endpoint/HttpRedirect/expid_***value***
- ***site-url_login_page***?expid=***{value}***
- ***site-url***/CommunitiesSelfReg?expid=***{value}***
- ***site-url***/.well-known/auth-configuration?expid=***{value}***
- ***secur***/forgotpassword.jsp?expid=***{value}***
- ***site-url***/services/auth/test/***authentication_provider***/?expid=***{value}***
- ***site-url***/services/auth/sso/***authentication_provider***/?expid=***{value}***
- ***site-url***/services/auth/link/***authentication_provider***/?expid=***{value}***
- ***site-url***/services/auth/oauth/***authentication_provider***/?expid=***{value}***
- ***site-url***/services/auth/authcallback/***authentication_provider***/?expid=***{value}***

Customize Your Experience Cloud Site's Login Experience

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

Customize your site's login experience—the experience that external users embark on when they log in to your site—from the Administration Login & Registration page. You can customize the default login page or the page you create with the Experience Builder or Visualforce. For example, you can choose which login page to use, allow internal users to log in directly to your site, and set up support for multiple authentication providers and single sign-on.

External users are typically customers and partners, or they're users with Community, Customer Portal, or partner portal licenses. We call users with the External Identity license—which enables access to the Salesforce Customer Identity product—external users.

> Note: Use dynamic branding URLs to customize the user's login experience at run time. Dynamic branding applies to the entire login process—the initial login page plus related pages, such as multi-factor authentication (MFA), Terms & Conditions, or login flow. You can add dynamic branding to default, Experience Builder, Visualforce, and custom login pages.

- If your site uses the Salesforce Tabs + Visualforce template, the login page assigned to the site by default is called `CommunitiesLogin`. Use Experience Builder or Visualforce to customize its appearance.
- If your site uses the Customer Service template, the login page assigned to the site by default is called `Login`. Use Experience Builder to customize its appearance.
- To update the login behavior for Visualforce and Experience Builder pages, update the `CommunitiesLoginController` Apex controller.
- If you create a custom login page, you must first modify the `CommunitiesLoginController` Apex controller and the `Site.login()` Apex method before you can assign it to a site.
- If you create dynamic logos and right-frame URLs, modify your login implementation to direct the user to the appropriate login URL based on the run-time situation.
- Publish custom Experience Builder pages before you assign them to a site.
- The login page you select in Experience Workspaces overrides other login page assignments in Site.com or Salesforce site settings.

Follow these steps to set up the Login section of the Login & Registration page.

1. From Setup, enter *`All Sites`* in the Quick Find box, then click **All Sites**. Click **Workspaces** next to the name of your site.

2. Select **Administration**, then select **Login & Registration**, and make your changes under the Login section.
3. Optionally, choose a custom login page for your site. Select the page type, **Experience Builder** or **Visualforce**. Then 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.

   Note: Only published pages appear in the lookup field when you configure an Experience Builder page for your Login and Home pages. If there aren't any published pages in your site, the current selection appears as Default Page. Select **Default Page** to revert to the default login page for your site's template.

   Warning: When you customize a login page or any page that includes fields with sensitive or confidential information with Experience Builder, we recommend that you use only standard components built by Salesforce or components that you built, customized, or vetted. Use of third-party components and code libraries on a page that includes fields with sensitive or confidential information can increase your risk for security vulnerabilities.

4. Optionally, select **Allow employees to log in directly to an Experience Cloud site**. This setting allows your internal users to use their internal username and password on the site login page.

   Employees must be members of the site to log in directly from the site login page. After they log in, your internal users land on the site home page.

5. Select which login options to display.

   By default, users log in to the site using the default site username and password. To allow users to log in with other credentials, like their Facebook©, Google©, or Salesforce credentials from another org, select them from the list.

   Important: Configure authentication provider options in advance to use them for site logins. From Setup, enter *Auth. Providers* in the Quick Find box, then select **Auth. Providers**.

6. Optionally, allow external users to log in with SAML single sign-on (SSO).

   SSO is available only if your org has set up SAML for your site on page 193. Setting up SSO requires:

   - An Identity Provider Login URL.
   - A subdomain created with My Domain. After setting up the subdomain, your application and login page URLs begin with the name of the subdomain, for example, `https://`*`mysubdomain`*`.my.salesforce.com/`.

   Note: If you enabled Single Sign-On, you can redirect users to a specific page after they've logged in to Salesforce. Add a startURL parameter to the networkId url. To redirect your customers to a specific page, add the following parameter to your company url: *`/servlet/networks/switch?networkId=<your 18 digit salesforce site ID, which can be found at the end of the site url>&startURL=<url of specific page you want to direct customers to>`*

   To offer multiple SAML single sign-on options, enter *Single Sign-On Settings* in the Quick Find box, select **Single Sign-On Settings**, and then click **Enable Multiple Configs**. If you already had SAML enabled, and you then enabled multiple SAML configurations, your existing SAML configuration is converted to work with multiple configurations.

   Users see the option **Log In with Single Sign-On**. If you have enabled multiple SAML single sign-on options, each login option is labeled with the name of each SAML configuration.

7. Click **Save**.

Note: Don't rename or delete the default login page. It can cause problems with the default site login flow.

IN THIS SECTION:

SEE ALSO:

Customize Code for Lightning Components on Login Pages

Create Dynamic Branding URLs

Customize Login, Self-Registration, and Password Management for Your Experience Cloud Site

Use Login Discovery to Simplify Login

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To access Experience Workspaces:

- Access Experience Management OR Manage Experiences OR Create and Set Up Experiences
- AND is a member of the Experience Cloud site

To create and edit Visualforce pages:

- Customize Application

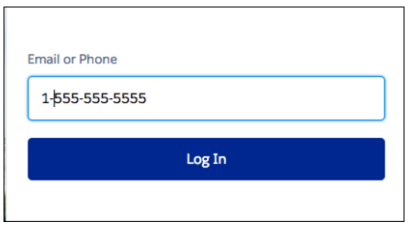
To edit Apex classes:

- Author Apex
- AND Customize Application

If you want your customers and partners to log in with another identifier than their username, such as a phone number or email address, configure your site with the Login Discovery Page. After users enter the identifier, they are challenged to verify themselves. For example, they are prompted to enter a verification code sent via email or text. If the user correctly enters the code on the Verify page generated by Salesforce, the user is logged in to your site. If SSO-enabled, Login Discovery can send the user directly to the identity provider login page. With Login Discovery, users can identify themselves using an email address or phone number. It also supports custom identifiers, such as an employee number or federation ID, in Apex.

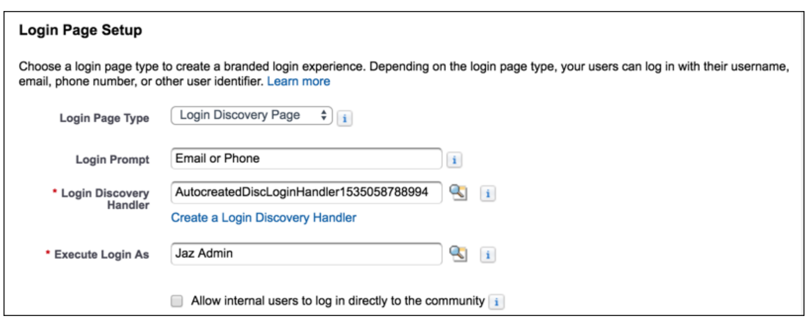
For an introduction to Login Discovery, watch A Mobile-First World Requires Mobile-First Login.

Create a Login Discovery Page to prompt users to log in with their email address, phone number, or a custom identifier.



1. From Setup, enter `All Sites` in the Quick Find box, then click **Workspaces** next to your site.
2. Select **Administration**, and then select **Login & Registration**.
3. Under Branding Options, customize the login page with your own logo, colors, and background.

   For details, see Brand Your Login Page with the Admin Workspace.
4. For Login Page Type, choose **Login Discovery Page**.



5. For Login Prompt, enter the text that you want to appear as the prompt on your login page.

   For example, enter `Email Address or Phone Number`. You can localize the login prompt with a custom label. Use the `$Label` global variable, for example, `$Label.loginPrompt`.
6. Leave the Login Discovery Handler blank.
7. Click **Create a Login Discovery Handler**.

   Salesforce generates a default login discovery handler after you save the page. But continue to fill out the page before you save it.

8. For Execute Login As, choose an admin with Manage Users permission.

   Execute Login As provides the context in which the Login Discovery handler runs. By assigning a user to the handler, operations performed by the handler are easily traced back to the login process. In production, you typically create a system user for the Execute Login As user.

9. Make sure that **Allow employees to log in directly to the site** isn't selected.

   The Login Discovery Page doesn't support org employees logging in to the site directly. However, you can customize the handler to redirect users to an IdP. For employees, you can set up Login Discovery with My Domain. From your My Domain Authentication Configuration settings, set the login page type to Discovery.

10. Click **Save**.
    Salesforce generates a default login discovery handler and populates the Login Discovery Handler field with its name. This handler accepts an email address or phone number from the login page and emails or texts a verification code to the user. If the user's email or phone number isn't verified, the user is prompted for a password.

You can modify the Login Discovery handler in Apex to extend its functionality. For details, see the LoginDiscoveryHandler Interface in the *Apex Reference Guide*.

Note: To support text-message verification, you purchase a license for Identity Verification Credits. This usage-based license provides your org a predetermined number of SMS messages for identity verification.

Customize the Default Login Process with Apex

USER PERMISSIONS

To create and edit Visualforce pages:
- Customize Application

To edit Apex classes:
- Author Apex

  AND

  Customize Application

You can provide Experience Cloud site members with a custom login page that reflects your org's style and branding. To change the look, customize the `CommunitiesLogin`login page, or create your own Visualforce page. To change login behavior, modify the `CommunitiesLoginController` Apex controller.

Note: To customize the Default login page or Experience Builder login page, you update the `CommunitiesLoginController` handler in Apex by following these steps. To customize the LoginDiscovery login page, modify the `Auth.LoginDiscoveryHandler` interface as described in the *Apex Reference Guide*.

1. From Setup, enter *`Apex Classes`* in the Quick Find box, then select **Apex Classes**.
2. Next to `CommunitiesLoginController`, click **Edit**.
3. Add the following code.

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

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

4. If you created a 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 custom login page, replace `SiteLogin` with the name of your Visualforce page.
9. Click **Save**.
10. From Setup, enter *`Visualforce Pages`* in the Quick Find box, then select **Visualforce Pages**.
11. Click **Edit** next to `CommunitiesLogin`.
12. In the first line of code, add the following:

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

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

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

16. Click **Save**.

Redirect Members to a Custom URL on Logout

When Experience Cloud site members log out, they're taken to your site login page by default. You can choose to redirect them to a different location, such as your company website. Specify the URL to which site members are redirected when they log out from your site.

1. From Setup, enter `All Sites` in the Quick Find box, then click **All Sites**. Click **Workspaces** next to the name of your site.
2. Select **Administration**, then select **Login & Registration**.
3. Under Logout, enter the URL where you want your site members to go after they log out.
4. Click **Save**.

SEE ALSO:

Customize Login, Self-Registration, and Password Management for Your Experience Cloud Site

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR
- Be a member of the site AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR
- Be a member of the site AND an experience admin or publisher in that site

Use Custom Change Password and Forgot Password Pages in Your Experience Cloud Site

You can customize Forgot Password and Change Password pages from the Experience Workspaces Administration Login & Registration page. Or you can create custom password pages in Visualforce. You can also customize the default password templates in Visualforce.

Note: You can use dynamic branding URLs to specify a branded forgot password page. With dynamic branding, you can control which password page a user sees when logging in to your site.

To use a custom Experience Builder Forgot Password page, first publish your login page in Experience Builder.

1. From Setup, enter `All Sites` in the Quick Find box, then click **All Sites**. Click **Workspaces** next to the name of your site.
2. Select **Administration**, then select **Login & Registration**.
3. Under Password, select the page type, 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.
4. Click **Save**.

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

Note: Lightning Out isn't available on Change Password pages.

SEE ALSO:

Customize Code for Lightning Components on Login Pages

Create Dynamic Branding URLs

Customize Login, Self-Registration, and Password Management for Your Experience Cloud Site

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To customize an Experience Cloud site:

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  OR

- Be a member of the site AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

Set Up Self-Registration for Your Experience Cloud Site

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

You can set up self-registration for your site from Experience Workspaces.

Note: You can specify dynamic branding URLs when you customize the self-registration form. This way, you can control which registration form a user sees depending on who is accessing the site and from where.

Follow these steps to let guests join your site.

1. From Setup, enter `All Sites` in the Quick Find box, then click **Workspaces** next to the name of your site.
2. Select **Administration**, then select **Login & Registration**.
3. Under Registration Page Configuration, select **Allow external users to self-register**.

   The L&R page now displays fields for setting up self-registration.
4. From Registration Page Type, choose a self-registration page from the list.

   Each self-registration page type has advantages.

   - Configurable Self-Reg Page—Gives you the ability to decide which identifiers guests register with, such as an email address, phone number, or username. You choose whether to require them to verify their identity and the information to collect when they register. With this page, you make it easy for guests to sign up by not requiring a username and password. The Configurable Self-Reg Page is branded according to the options set on the L&R page.
   - Experience Builder Page—Lets you use the Experience Builder to manage and brand your self-registration page. This page requires users to register a username and password.
   - Default Page—Gives you a simple self-registration page with basic styling. It's intended to serve as a starting point to customize the look and behavior of self-registration.
   - Visualforce Page—Let's you enable the custom Visualforce page that you created to control the self-registration process.

   a. If you choose Configurable Self-Reg Page, follow these instructions to set up self-registration.

   b. If you choose Experience Builder Page, click and select **Register** from the list. If Register isn't listed, return to Experience Builder and click **Publish**.

   c. If you choose Visualforce Page, click and select the appropriate Visualforce page from the list.

   d. If you choose Default Page, you have a simple self-registration page.

   With the Default Page, you can return to the default values when trying out different self-registration options.
5. To assign to self-registering users, select the default profile.

   Note: Keep the following in mind when selecting a default profile:

   - You can only select profiles that are associated with the site. If the selected profile is removed from the site, the Profile resets to None.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR
- Be a member of the site AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR
- Be a member of the site AND an experience admin or publisher in that site

- For security reasons, Salesforce discourages the use of standard external profiles for self-registering users. We recommend that you clone and rename a standard profile and use that one for self-registration. To allow the use of standard external profiles for self-registration, go to **Setup** > **Digital Experiences** > **Settings** and enable **Allow standard external profiles for self-registration and assignment to users**.
- The **Allow standard external profiles for self-registration and assignment to users** preference can also be enabled using Metadata API.

6. Select the account that you want to assign self-registering users to.

   The self-registering user is assigned as a contact of the account you specify. Ensure that the account you use is enabled as a partner. Go to the account, click **Manage External Account**, and click **Enable as Partner**.For high-traffic sites, we recommend that you turn on account role optimization. This greatly increases the number of users who can register at a time.

   If your org uses person accounts, leave this field blank. Then create a person account for each self-registering user.

7. Click **Save**.

After you set up self-registration, a Sign Up link appears on your site login page. When clicked, it directs external users to the self-registration page. When a user self-registers to join your site:

- Salesforce creates a user record with the information provided on the self-registration page.
- The user is assigned the profile that 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 up your org.
- If a user attempts to self-register under a username that's already in use, they get an error message. Salesforce administrators aren't notified when the error occurs.

Note: When users self-register, they each consume one of your licenses. When setting up your self-registration page, add criteria to ensure that the right people are signing up. To prevent unauthorized form submissions, we recommend that you use a security mechanism, such as CAPTCHA or a hidden field, on your self-registration page.

IN THIS SECTION:

Create Person Accounts for Self-Registering Users

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

Use the Configurable Self-Reg Page for Easy Sign-Up

You can use the default self-registration page to sign up visitors with a username and password. But to give visitors a simpler, mobile-centric self-registration experience, use the Configurable Self-Reg Page. With this self-registration page, users can sign up with only an email address or phone number, instead of having to create a username and password. With this lightweight sign-up process, you can limit the amount of information that you collect from the users when they sign up. On subsequent logins, you can get more information, building a member's profile through progressive profiling powered by the login flow.

Verify Member Identities for Experience Cloud Site Self-Registration

When users sign up for your site with an email address or phone number, Salesforce sends them a verification code and generates the Verify page. The Verify page is where users confirm their identity, and you can replace the default Verify page with your own using Visualforce and a couple of Apex methods. After verifying their email address, external users can log in with one-time password (OTP) via email (passwordless login).

Customize the Experience Cloud Site Self-Registration Process with Apex

You can change how external users register for your site by modifying the default self-registration controller or by replacing it with your own custom self-registration controller. However, it's easier to modify the generated Configurable Self-Reg handler created when you choose Configurable Self-Reg Page from the Experience Workspaces Administration Login & Registration page.

Best Practices and Considerations When Configuring Self-Registration

When configuring self-registration for Experience Cloud sites, keep these best practices and considerations in mind. Remember that self-registration is open to anyone who chooses to access your site. Think about the implications of giving self-registered users too much access to objects and records. Keep your business's security in mind when setting up your security settings. Use the checklist to assess your org's readiness for self-registration.

SEE ALSO:

Customize Code for Lightning Components on Login Pages

Create Dynamic Branding URLs

Customize the Experience Cloud Site Self-Registration Process with Apex

Create Person Accounts for Self-Registering Users

Create Person Accounts for Self-Registering Users

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

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: Contact Salesforce Customer Support to enable Person Accounts. Only External Identity, Customer Community, and Customer Community Plus licenses support the creation of person accounts.

You set up self-registration for person accounts from your Experience Cloud site's Login & Registration page. Under Registration, select **Allow external users to self-register**. Make sure that the **Account** field is empty. When you remove the Account information, new users are created as person accounts.

Salesforce creates a separate person account for each self-registering user. Each user is assigned the default profile you specified while setting up self-registration. You can customize the self-registration functionality with the self-registration Apex controller (`CommunitiesSelfRegController`), but it's not required.

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

SEE ALSO:

Person Accounts

Enable Person Accounts

Use the Configurable Self-Reg Page for Easy Sign-Up

You can use the default self-registration page to sign up visitors with a username and password. But to give visitors a simpler, mobile-centric self-registration experience, use the Configurable Self-Reg Page. With this self-registration page, users can sign up with only an email address or phone number, instead of having to create a username and password. With this lightweight sign-up process, you can limit the amount of information that you collect from the users when they sign up. On subsequent logins, you can get more information, building a member's profile through progressive profiling powered by the login flow.

Create a configurable sign-up page from your Experience Cloud site's Workspaces Login & Registration page. It's available when you create the login page using a Login Discovery Page, Visualforce Page, or Default Page. If your login page type is an Experience Builder Page, Configurable Self-Reg Page isn't available.

For an introduction to configurable self-registration, watch A Mobile-First World Requires Mobile-First Login.

1. From Setup, enter `All Sites` in the Quick Find box, then click **Workspaces** next to your site.
2. Select **Administration**, and then select **Login & Registration**.
3. Select **Allow customers and partners to self-register**.
4. For Registration Page Type, select **Configurable Self-Reg Page**.

   The Login & Registration page displays fields for setting up self-registration.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To access Experience Workspaces:

- Access Experience Management OR Manage Experience OR Create and Set Up Experiences
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To create and edit Visualforce pages:

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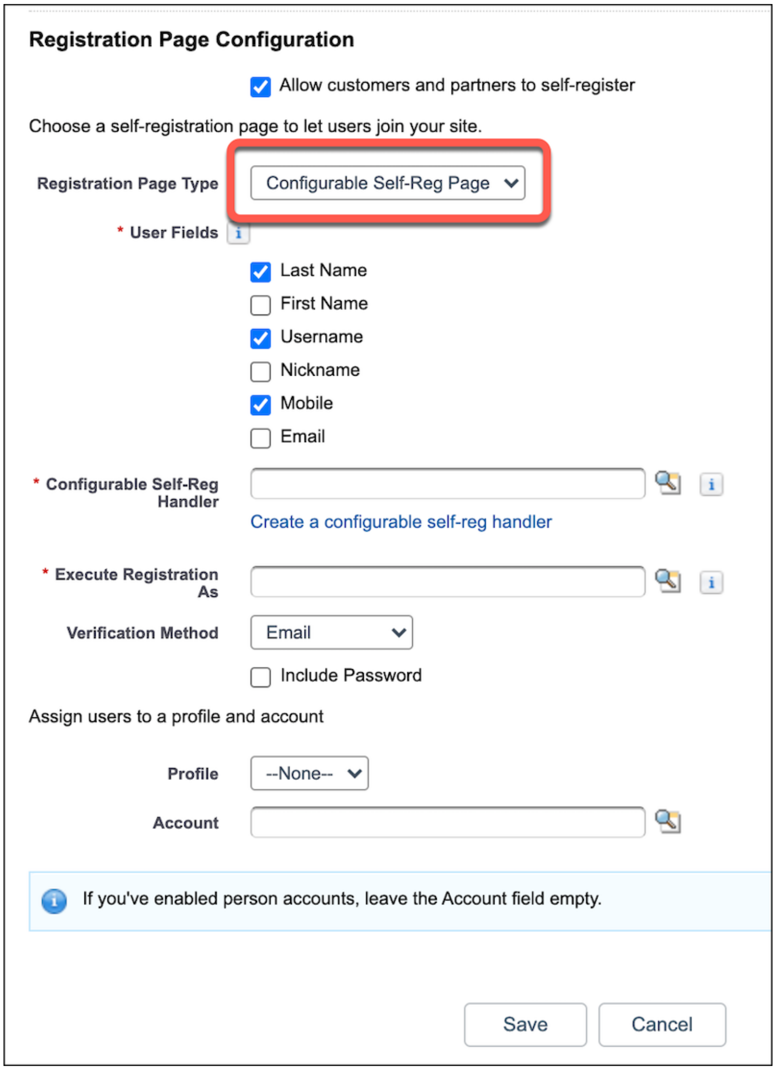
- Author Apex
- AND Customize Application



5. For User Fields, select which fields to display on the self-registration page.

   Users are required to supply this information when they register. If the information isn't supplied, the handler populates the fields with dummy values. For example, if a last name isn't requested at sign-up, the user is assigned a last name like SiteUser1550768707871.

6. Leave Configurable Self-Reg Handler blank.

7. Click **Create a configurable self-reg handler**.

   Salesforce generates a self-registration handler after you save the page. But continue to fill out the page before you save it.

8. For Execute Registration As, choose a Salesforce admin with Manage Users permission.

   Execute Registration As provides the context in which the Configurable Self-Reg handler runs. By assigning a user to the handler, operations performed by the handler are easily traced back to the registration process. For example, if a contact is created, this user creates it. In production, you typically create a system user for the Execute Registration As user.

9. For Verification Method, if you want visitors to verify their identity when they sign up, select either **Email** or **Text Message**.

   To require users to enter a password when they log in, select **None**.

The verification method is independent of the user fields you select. For example, if you select **Email** as a user field and **None** as the verification method, Salesforce collects the user's email address and prompts for a password instead of sending a verification code.

10. If you want users to create a password when they sign up, select **Include Password**.

    When selected, the sign-up page contains Password and Confirm Password fields. Even if you set up email or text verification, you could collect a password at sign-up as a precaution. For example, if text-message verification is required but the mobile device isn't available, the user can log in with a password.

    Note: If you select **None** as the verification method, you must select **Include Password**. Otherwise, the new user can't log in.

    If you don't select Include Password, Salesforce generates a random password when the user is created.

11. For Profile, select a profile configured for your org, such as an External Identity, Customer Community User, or Partner Community User profile.
    This setting assigns new users a profile to control access. The profile selected here is passed to the Configurable Self-Reg handler. Unless modified, the new user is assigned this profile. If you don't specify a value here, make sure that your handler sets a user profile explicitly before inserting a user. Every user requires a profile.
12. For Account, choose the account to contain your site members. Each member is listed as a contact in the account.
    The account selected here is passed to the Configurable Self-Reg handler. Leave the field blank if your org is set up for Person accounts. If you want, you can override Account in Apex. For example, you can disassociate customers or partners from accounts to create contactless users.
13. Click **Save**.
    Salesforce generates a configurable self-registration handler and populates the Configurable Self-Reg Handler field with its name. The resulting sign-up form prompts users to register with the user fields that you selected. A user is created only if identity verification is successful.
14. Check whether self-registration works.
    a. From a private (incognito) browser, open your site login page.
    b. Click **Sign Up**, and register a new user.
    c. If prompted for an email address or phone number, enter your own to complete the verification process.
    d. If verification succeeds, you are directed to the start page configured for your site, typically the site's home page.

You can modify the handler in Apex to extend its functionality. For example, you can add logic to ensure that the new member's email address and phone number are unique in your org. You can also control how the user is created and populate fields on the self-reg form with your values. However, the handler can't change the prompts on the self-registration form. These prompts are determined by the user fields selected on the Login & Registration page, such as First Name and Last Name.

To modify the Configurable Self-Reg handler in Apex, see the ConfigurableSelfRegHandler Interface in the *Apex Reference Guide*.

Verify Member Identities for Experience Cloud Site Self-Registration

When users sign up for your site with an email address or phone number, Salesforce sends them a verification code and generates the Verify page. The Verify page is where users confirm their identity, and you can replace the default Verify page with your own using Visualforce and a couple of Apex methods. After verifying their email address, external users can log in with one-time password (OTP) via email (passwordless login).

Salesforce actually supplies two default Verify pages, one for email and one for SMS verification. For convenience, you can brand the default Verify pages with your logo, colors, and background, but you can't change the form itself. Here's the default Verify page for SMS verification.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

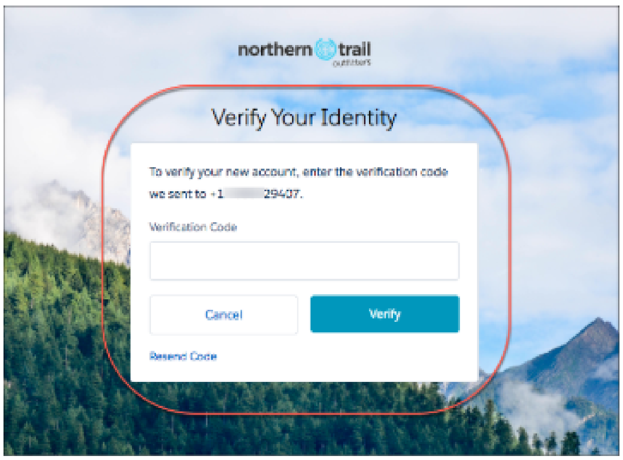
- Be a member of the site AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site



1. To replace the default Verify page with your own, create a Visualforce page. Include the Apex methods `System.UserManagement.initSelfRegistration` and `System.UserManagement.verifySelfRegistration`.

   `System.UserManagement.initSelfRegistration` initiates a verification challenge and includes a user object to be inserted after successful registration. `System.UserManagement.verifySelfRegistration` completes the verification, and if successful, the user is created and logged in. The method returns the `Auth.VerificationResult`, which contains the verification status and session ID after the user is created.

2. From Workspaces, set up site self-registration with the **Email** verification method.

   a. From Setup, enter *`All Sites`* in the Quick Find box, and then select **All Sites**. Next to your site, click **Workspaces**.

   b. Select **Administration**, and select **Login & Registration**.

   c. For Registration page type, select **Configurable Self-Reg Page**.

   d. For Verification Method, choose **Email**.

3. Optional. Create a list view that tracks whether users have verified their email addresses and phone numbers.

   a. From Setup, enter *`Users`* in the Quick Find box, and then select **Users**.

   b. Click **Create New View** and select these verification-specific fields.

   - Admin Trusted Mobile Number
   - One-Time Password App

- Salesforce Authenticator
- Temporary Code
- U2F Security Key
- User Verified Email
- User Verified Mobile Number

Customize the Experience Cloud Site Self-Registration Process with Apex

You can change how external users register for your site by modifying the default self-registration controller or by replacing it with your own custom self-registration controller. However, it's easier to modify the generated Configurable Self-Reg handler created when you choose Configurable Self-Reg Page from the Experience Workspaces Administration Login & Registration page.

These steps describe how to create a custom self-configuration page in Apex. For example, you can create a self-configuration page to assign different profiles or permission sets for different sites. The self-registration process entails:

- Generating a registration form that guests use to register with your site.
- Confirming that a password reset email is sent. The email is sent to users when the site requires users to log in with their passwords.

To generate the registration form, modify `CommunitiesSelfRegController` and the associated `CommunitiesSelfReg` Visualforce page. You use this single Apex controller regardless of which registration page type you choose. You also use this controller to implement multiple sites. Then you direct users to the appropriate start URL for each site.

To confirm that a password reset email is sent, modify `CommunitiesSelfRegConfirmController` and the associated `CommunitiesSelfRegConfirm` Visualforce page.

Note: The customizations you make in `CommunitiesSelfRegController` override the Login & Registration page settings. In orgs created before the Spring '15 release, existing Apex customizations for self-registration remain in effect.

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 change Apex only by using the Metadata API `deploy` call, the Salesforce Extensions for Visual Studio Code, or the Ant Migration Tool. The Salesforce Extensions for Visual Studio Code and Ant Migration Tool are free resources provided by Salesforce to support its users and partners, but are not considered part of our Services for purposes of the Salesforce Master Subscription Agreement.

1. From Setup, enter *`Apex Classes`* in the Quick Find box, then select **Apex Classes**.
2. Click **Edit** next to `CommunitiesSelfRegController`.
3. Optionally, enter a value for `ProfileId` to define which type of profile to assign to the user.
4. Enter the account ID for the partner or customer account that users who self-register are associated with.

   This account ID value overrides the default account set on the Login & Registration page.

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

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To create an Experience Cloud site:
- Create and Set Up Experiences AND View Setup and Configuration

To customize an Experience Cloud site:
- Be a member of the site AND Create and Set Up Experiences

  OR
- Be a member of the site AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:
- Be a member of the site AND Create and Set Up Experiences

  OR
- Be a member of the site AND an experience admin or publisher in that site

5. If you're enabling self-registration for multiple sites, add code to assign the correct profile, role, and account ID to each site.
6. Click **Save**.
7. Enable access to accounts and contacts for the guest profile. The guest profile is automatically associated with your site.
   a. From Setup, enter *`All Sites`* in the Quick Find box, then select **All Sites**, and click **Workspaces** next to a site.
   b. Select **Administration**, select **Pages**, and then click **Go to Force.com**.
   c. Click **Public Access Settings**.
   d. Under Standard Object Permissions, select **Read** and **Create** next to Accounts and Contacts and click **Save**.
   e. Under Enabled Apex Class Access, click **Edit**.
   f. Add `CommunitiesSelfRegController` to **Enabled Apex Classes**, and click **Save**.
   g. Under Enabled Visualforce Page Access, click **Edit**.
   h. Add `CommunitiesSelfReg` to **Enabled Visualforce Pages**, and click **Save**.
8. Optionally, to customize the contents of the default self-registration page, edit the `CommunitiesSelfReg` page.

   Note: Don't rename or delete the default self-registration page. It can cause problems with the self-registration flow.

   a. From Setup, enter *`Visualforce Pages`* in the Quick Find box, then select **Visualforce Pages**.
   b. Click **Edit** next to `CommunitiesSelfReg`.
   c. Add code to customize the fields required for self-registration or the page's look and feel.
      In the default form, all fields except Password are required.
   d. Click **Save**.

When setup is complete, external users who submit the completed self-registration form are logged in to the site.

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

If you're using a custom Visualforce self-registration page instead of the default, update `CommunitiesSelfRegController`. Then replace `CommunitiesCustomSelfRegPage` with the name of your custom self-registration page.

Best Practices and Considerations When Configuring Self-Registration

When configuring self-registration for Experience Cloud sites, keep these best practices and considerations in mind. Remember that self-registration is open to anyone who chooses to access your site. Think about the implications of giving self-registered users too much access to objects and records. Keep your business's security in mind when setting up your security settings. Use the checklist to assess your org's readiness for self-registration.

General Best Practices and Considerations

- Assign a cloned standard site profile as the default for self-registration. Never use a standard site profile as the default self-registration profile.
- Use a restrictive default profile. If needed, open up object access using other sharing mechanisms, such as permissions sets or sharing rules.
- Create a separate profile or permission set for each self-registration use case and site. For example, set up an account permission set for your self-service site, and another account permission set for your partner portal.
- Make sure that your object data is secure by checking your org's sharing and object settings. Run an audit of internal and external org-wide defaults, object access, sharing rules, and all other sharing mechanisms before setting up self-registration.

- Apply the same considerations and best practices that you do for self-registered users to social logins, such as logins using Facebook, LinkedIn, and Google.

Best Practice for Experience Builder Sites

- Consider using audience targeting to restrict user access to pages or content and deliver a scaled down site experience.

Self-Registration Checklist

Use this questionnaire to answer some questions and assess your org's readiness for self-registration.

- What records do you want self-registered users to view?
- What fields on the object do you want self-registered users to view or edit?
- How much access do you want self-registered users to have?
- Do you want self-registered users to create records?
- Do you want self-registered users to edit records?
- Do you want self-registered users to delete records?
- Do you want self-registered users to see other users in the org?
- If so, do you want to hide some personally identifiable information fields?
- Do you want self-registered users to create groups in the site?

  Note: If possible, limit group creation.

- Can self-registered users be group managers?

  Note: Assess the implications of an unvetted group manager.

- Can self-registered users post and comment in a site?

  Note: Set up moderation rules for all sites.

- Can self-registered users create and manage topics?
- Can self-registered users @mention everyone in the site?
- Can self-registered users access files in public groups?
- Can self-registered users use direct messages?
- Do the search configurations give self-registered users access to the right data?
- What does a self-registered user's folder access look like?

  Note: Folder access controls access to reports, dashboards, emails, and libraries.

- Can self-registered users access connected apps?
- Can self-registered users access Visualforce pages and Apex classes?
- Do self-registered users have API access?

Customize Code for Lightning Components on Login Pages

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

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

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

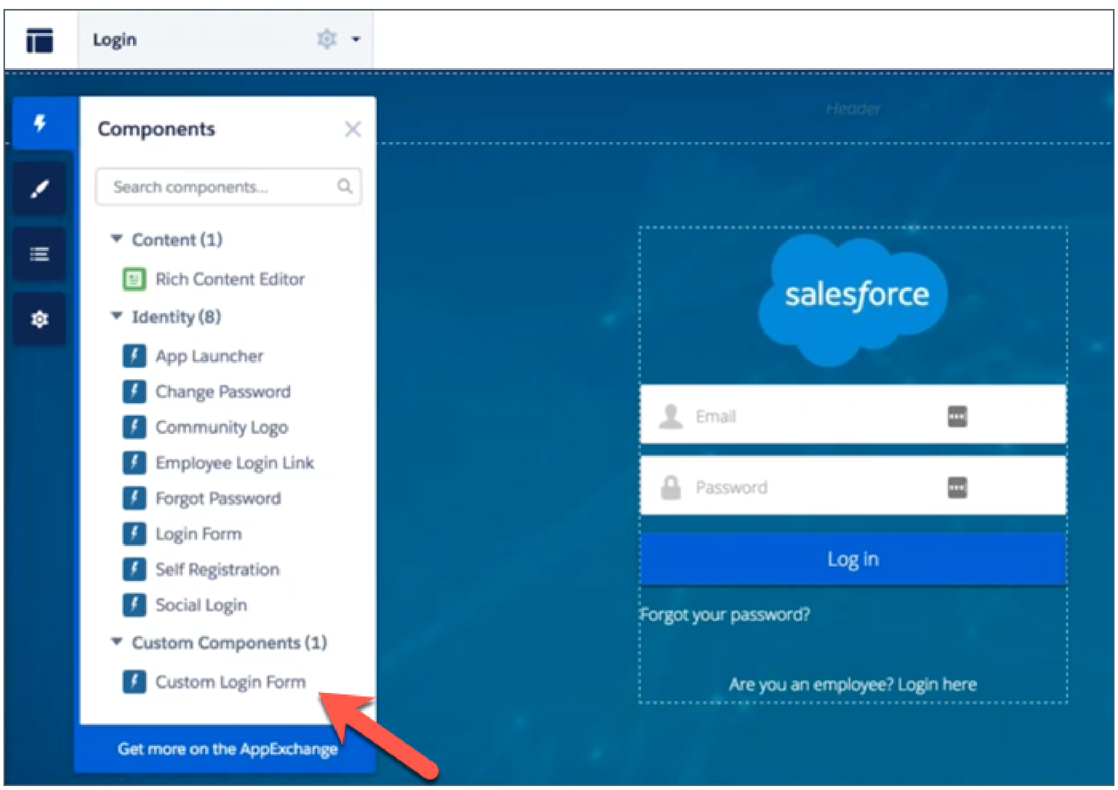
USER PERMISSIONS

To create and edit Lightning components:

- Customize Application

1. From Setup, enter `Lightning Components` in the `Quick Find` box, then select **Lightning Components** under Develop.
2. From the list of components, click the one you want to customize.

   For example, to customize the login experience, click loginForm.
3. On the Lightning component detail page, click **Developer Console**.
4. In the Developer Console workspace, add `implements="forceCommunity:availableForAllPageTypes"` to the `<aura:component>` tag. Implementing the `forceCommunity:availableForAllPageTypes` interface exposes the component in Experience Builder.
5. Add custom code logic and save your changes as a new custom component.
6. Go back to Experience Builder in your site and bring up the Login page from the list of pages. The custom component you created appears on the list of components.



Enable Other Salesforce Features in Experience Cloud Sites

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

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

Enable Cases for Experience Cloud Site Users

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

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

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

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

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

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To enable cases:
- Manage Profiles and Permission Sets

SEE ALSO:

Restrict Experience Cloud Site User Access to Cases
Merge Fields for Experience Cloud Sites
Enable Portal Reply Email Notifications in Case Feed

Restrict Experience Cloud Site User Access to Cases

Determine whether users with Customer Community Plus licenses can view and edit cases in which they are listed as the contact. You can disable the standard sharing behavior that grants the assigned contact and everyone in their role hierarchy access to a case. After disabling this sharing behavior, you can control access to cases by creating a manual share or by using Apex managed sharing.

For example, Acme has offices around the world, and it wants to keep its cases private within each office location. By disabling the standard sharing behavior, Experience Cloud site users who transfer from one of Acme's locations to another can no longer bring their assigned cases with them.

1. From Setup, enter `Sharing Settings` in the Quick Find box, and then select **Sharing Settings**.
2. In the Other Settings section, deselect **Grant site users access to related cases**.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

Site Case Feed

With the site case feed, agents and Experience Cloud site members see the life cycle of a case from start to finish. All case interactions appear in a unified, chronological Chatter case feed. Site members benefit from the added functionalities of Chatter, while support-side features help agents provide efficient, personalized support.

The site case feed gives Experience Cloud site users an intuitive environment where they can manage their cases. Internal and external users see the following interactions in the site case feed:

- Chatter text, file, and link posts
- Questions in Chatter that are associated with the case
- Case emails

  Note: To learn more about case email visibility, see Emails in the Site Case Feed.

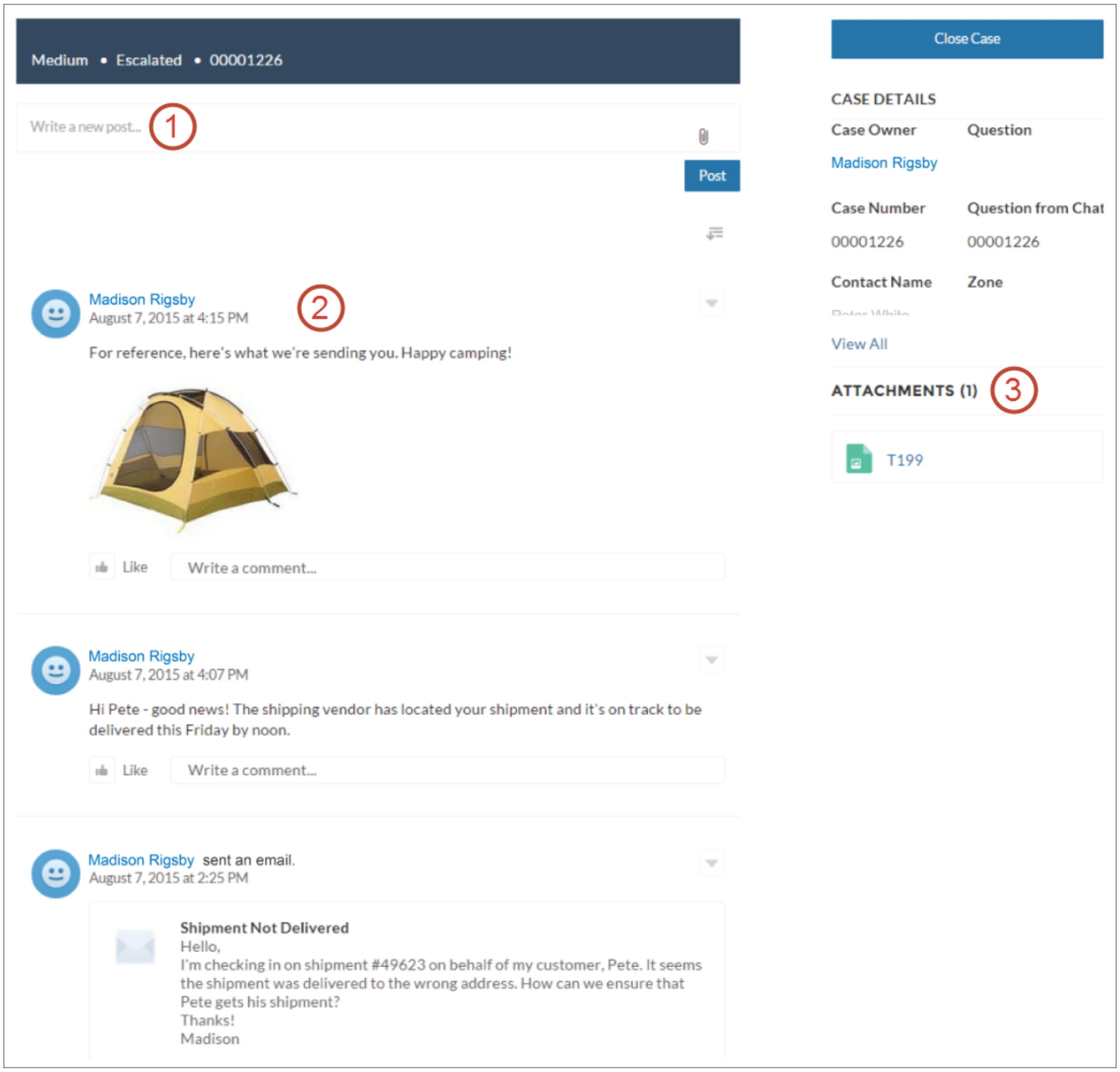
- Read-only social posts on cases if your Salesforce admin enables them

Site case feed in an Experience Cloud site built on the Customer Service template:

EDITIONS

Available in: Salesforce Classic

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



Using the publisher **(1)**, users create posts and attach files to the case. The feed **(2)** comes fully equipped with Chatter's collaboration tools: users can bookmark, like, and comment on posts, and mention other users. Images and comments appear inline, making it easy to scan the feed for details. The Attachments component **(3)** displays all case attachments.

When the site case feed is enabled, support agents can:

- Use the action in the console case feed to answer questions and create private and public Chatter posts on cases
- Expose or hide a published post or email in the site case feed of external users

The site case feed is available in all Experience Cloud sites that use the self-service templates or Salesforce Tabs + Visualforce.

Known Issues

- In sites built on templates, emails in the site case feed don't display inline images or clickable links.

- In sites built on the Koa or Kokua templates, users' names in the site case feed look like links but don't lead anywhere.

SEE ALSO:

Site Case Feed Considerations
Set Up the Site Case Feed
Expose or Hide a Published Post or Email in the Site Case Feed
Post on Cases and Experience Cloud Site Questions with the Experience Action in the Case Feed

Set Up the Site Case Feed

The site case feed lets Experience Cloud site users and support agents see all case interactions in a unified feed. Also, agents can take more actions directly from the console. To set up the site case feed, enable it in your org and make sure that the case page in your site is properly configured.

EDITIONS

Available in: Salesforce Classic

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

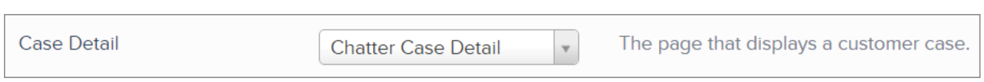
USER PERMISSIONS

To enable the site case feed:

- Customize Application
- Compact case feed enabled in your org

Important: Before setting up the site case feed, read Site Case Feed Considerations.

1. Enable the site case feed:
   a. From Setup, enter `Support Settings` in the Quick Find box, then select **Support Settings**.
   b. Select **Enable Site Case Feed**.
   c. Optionally, select **Enable Email Notifications for Case Posts** (recommended).
   d. Click **Save**.
2. If your site was built using Salesforce Tabs + Visualforce, make sure that your case page includes a Chatter feed.
3. If your site uses the Customer Service template, confirm that your active case detail page supports the site case feed:
   a. In Experience Builder, click .
   b. Click **Page Management**.
   c. Find Case Detail in the Name column, and make sure the active page assigned to it is either Chatter Case Detail (the default) or Record Detail.



If you change the active case detail page, publish your change.

Important: If the site case feed is enabled and you use Basic Case Detail as your active case detail page, external users see only case comments—not Chatter posts or emails—in their case feed. This gives external users far less visibility into their cases. To give users a full view of their case interactions, use Chatter Case Detail or Record Detail as your active case detail page.

Site Case Feed Considerations

EDITIONS

Available in: Salesforce Classic

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

Before setting up the Experience Cloud site case feed, review this information.

If the site case feed is enabled:

- Agents can use the action in the console case feed to answer questions and create private and public Chatter posts on cases.
- Agents can expose or hide published Chatter posts and emails in the case feed of external site users.
- External site users with access to a case see associated Chatter posts, questions, and emails in their case feed.

If email notifications for case posts are enabled:

- When someone makes an externally visible post on a case and the **Visible in Self-Service Portal** setting is selected on the case, all case contacts that are also site members are notified by email. They can comment on the post by replying to the email.
- If you're already using custom email notification settings, such as those triggered by workflows, selecting this preference can create duplicate email notifications.
- In sites built on the Customer Service template or Salesforce Tabs + Visualforce, you can turn off these notifications. In your email notification settings, deselect **Posts on one of my cases** under "Email me when someone...".

SEE ALSO:

Emails in the Site Case Feed

Expose or Hide a Published Post or Email in the Site Case Feed

Set Up the Site Case Feed

Emails in the Site Case Feed

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

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

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

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

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

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

```
}
```

SEE ALSO:

Expose or Hide a Published Post or Email in the Site Case Feed

Expose or Hide a Published Post or Email in the Site Case Feed

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

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

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

EDITIONS

Available in: Salesforce Classic

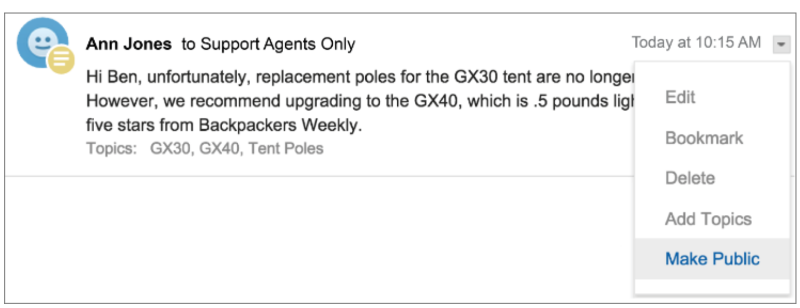
Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

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

- Edit My Own Posts
- Edit Posts on Records I Own
- Compact case feed enabled in your org
- Site case feed enabled in your org

Make Public option on a case Chatter post:



Make Public option on a case email:

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

Making Emails and Chatter Posts *Private*

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

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

Making Emails and Chatter Posts *Public*

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

Note:

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

SEE ALSO:

Site Case Feed

Enable Chatter Questions in Your Experience Cloud Site

EDITIONS

Available in: Salesforce Classic

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

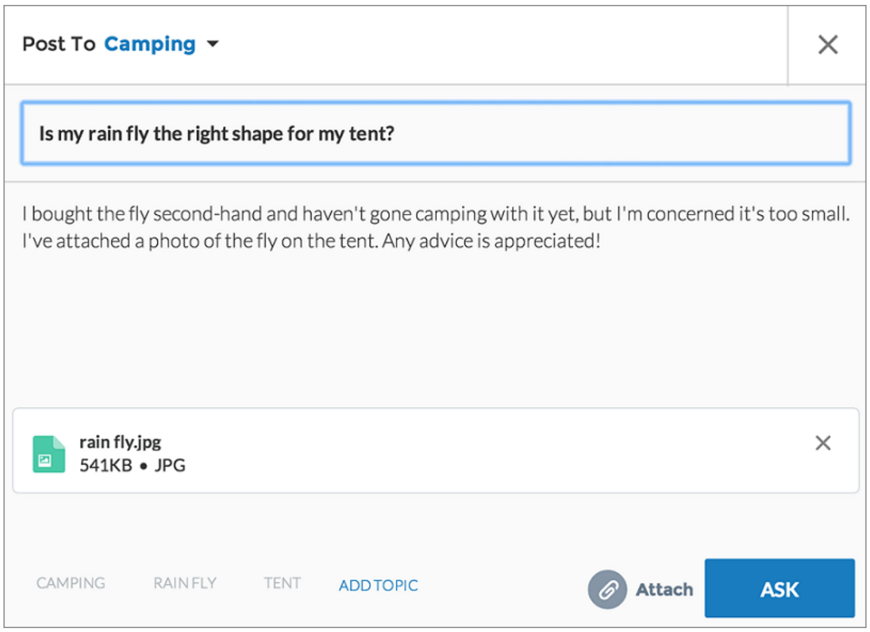
USER PERMISSIONS

To edit the global publisher layout:

- Customize Application

Chatter Questions helps you promote engagement by giving users the ability to ask and answer questions in their Chatter feed, in groups, and in records. Members in your users' groups and Experience Cloud sites can answer questions in Chatter just as they would comment on a Chatter post. Users in sites built on the Customer Service template can also attach files to questions.

To set up Chatter Questions, add the Question action to the global publisher layout. In orgs created after Summer '14, the Question action is automatically added, but we recommend dragging it to the far left to increase its visibility.



1. From Setup, enter `Publisher Layouts` in the `Quick Find` box, then select **Publisher Layouts**.
2. Click **Edit** next to the global publisher layout.
3. Drag the Question action from the palette to the global publisher layout. If the Question action already appears in the layout, drag it to the location where you want it.
4. Click **Save**.

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

SEE ALSO:

Track Use of Chatter Questions in Your Salesforce Organization and Experience Cloud Sites

Send Emails to Leads and Contacts from an Experience Cloud Site

Enable the Send Email button, so partner and customer users can send emails to leads and contacts from their Experience Cloud site.

EDITIONS

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

USER PERMISSIONS

To manage external users:
- Manage External Users

To create, edit, and delete profiles:
- Manage Profiles and Permission Sets

1. Click **Edit** next to the Partner or Customer user profile.
2. Scroll down to General User Permissions and select **Send Email**.
3. Save your changes.
4. From Object Manager, enter `Contact` in the Quick Find box. Select **Contacts** > **Page Layouts** > **Contact Page Layouts**.
5. Add the Activity History related list to the page layout.
6. Add the Email action to Salesforce Mobile and Lightning Experience Actions.
7. Save your changes.
8. Repeat steps 4–7 for Leads.
9. To enable partner or customer site users to send emails to groups of leads, contacts, or campaign members, click **Edit** next to their user profile.
10. Select **Send Email**, **Mass Email**, and **Allow sending of List Emails**, from General User Permissions.
11. Repeat steps 4–7.

Enable Upvotes and Downvotes

Enable upvoting and downvoting in lieu of liking questions and answers in your Experience Cloud site. When you enable upvoting and downvoting, members see an **Upvote** option under a question or answer and a **Downvote** option on the question or answer's overflow menu. The **Like** option goes away. Upvoting and downvoting are disabled by default in Experience Cloud sites created in Spring '19 and later.

For sites created before the Winter '18 release, it's an easy task to enable up and down voting.

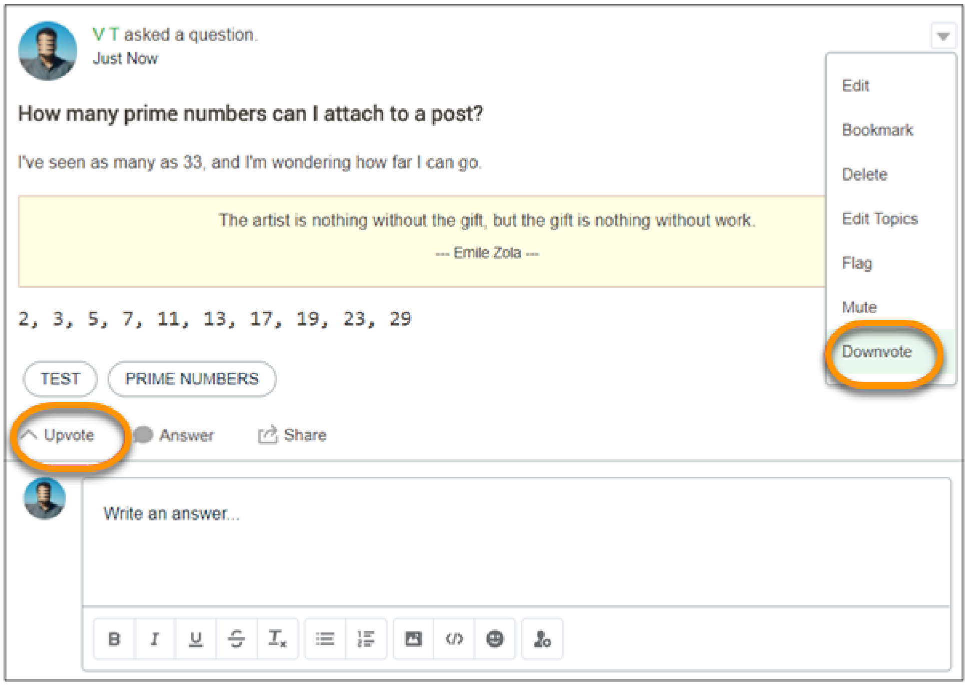
EDITIONS

Available in: Experience Builder sites

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

USER PERMISSIONS

To enable up and down voting:
- Create and Set Up Experiences

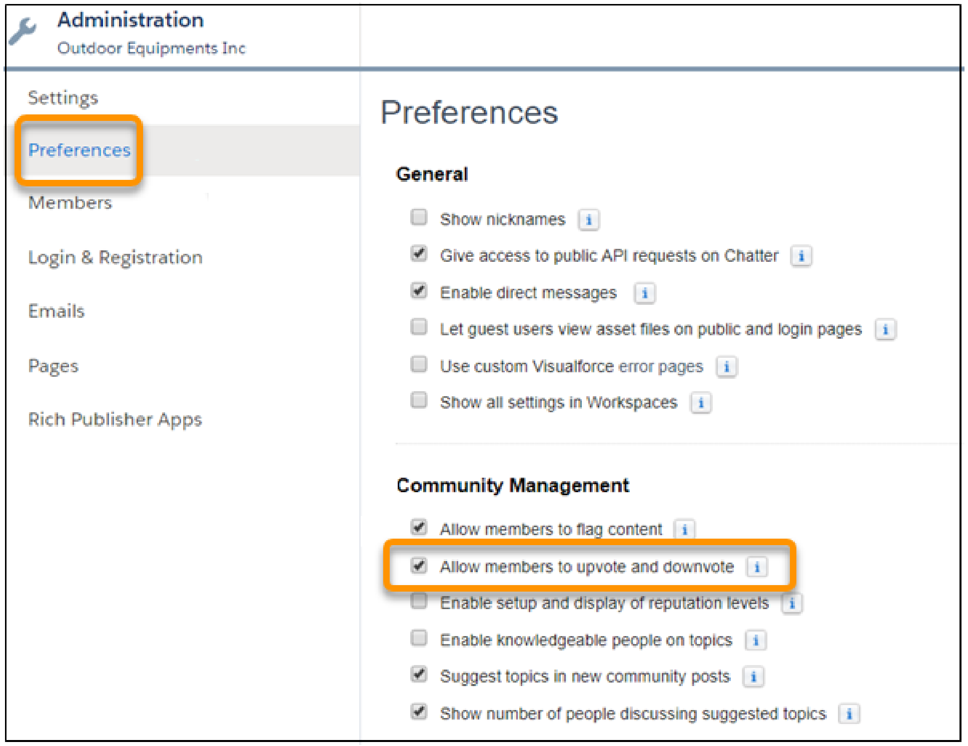


When you change to upvotes, pre-existing likes are included in the upvote count. Click the count to see a list of the people who have upvoted.

Note: No one is listed more than once, even if a person both liked and upvoted a question or answer. But each like and upvote is counted. For example, if someone both liked and upvoted a question, the count is 2, although their name is listed only once. If you prefer not to merge your like and upvote counts, contact Salesforce support.

Note: On influence cards, upvotes count as likes received. Your own upvotes on your own posts or comments aren't counted towards influence. Downvoting a post or comment doesn't reduce the like count, unless a user is changing their own upvote to a downvote.

1. Go to Experience Workspaces and click **Administration** > **Preferences**.
2. Under Experience Management, select **Allow members to upvote and downvote**.



3. Click **Save**.

Assign Permission to Verify Answers for Your Company

Sometimes there's more than one correct answer to a question. Among the correct answers, your company can prefer one course for people to follow. You can highlight an answer your company endorses by marking it as Company Verified. Questions marked as Company Verified or as Best Answer are copied to the top of the thread under a Top Rated Answers section. As the community manager, you can give permission to the members best qualified to speak for the company. You can grant **Verify Answers to Chatter Questions** through user profiles or permission sets.

Assign the **Verify Answers to Chatter Questions** permission in Setup. You can assign the permission by adding it to a permission set or a user profile.

Assign Permission to Verify Answers Through a Permission Set

These steps guide you through assigning the **Verify Answers to Chatter Questions** permission through a permission set.

Assign the **Verify Answers to Chatter Questions** permission in Setup.

1. In Setup, enter `Permission Sets` in the `Quick Find` box, then click **Permission Sets** in your results.
2. Open the permission set you plan to use.
3. Open **System Permissions**, click **Edit**, and select **Verify Answers to Chatter Questions**.

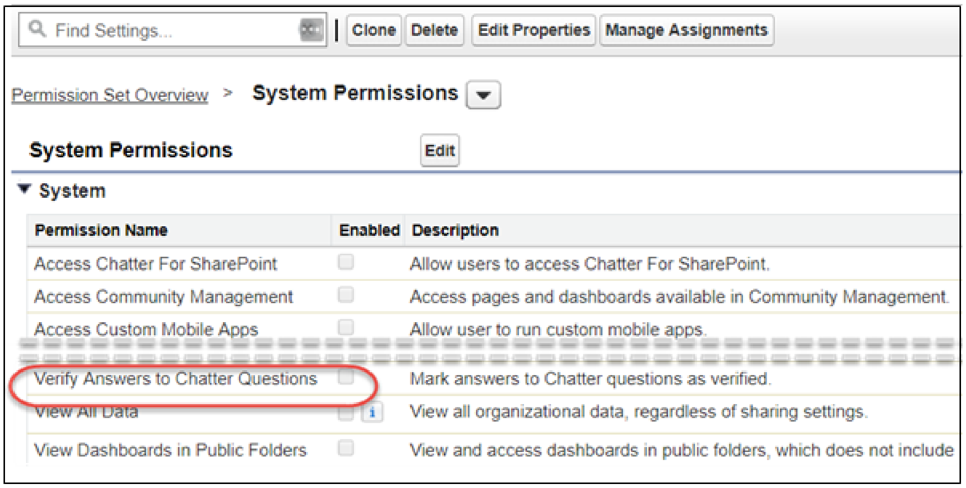
EDITIONS

Available in: Experience Builder sites

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

USER PERMISSIONS

To assign permission to company-verify answers:
- Create and Set Up Experiences



4. Click **Save**.
5. If necessary, assign the permission set. You can assign permission sets to a single user from the user detail page. You can assign multiple users to a permission set from any permission set page.
   The **Company Verify** option appears on the answer overflow menu only to users with the **Verify Answers to Chatter Questions** permission.

SEE ALSO:

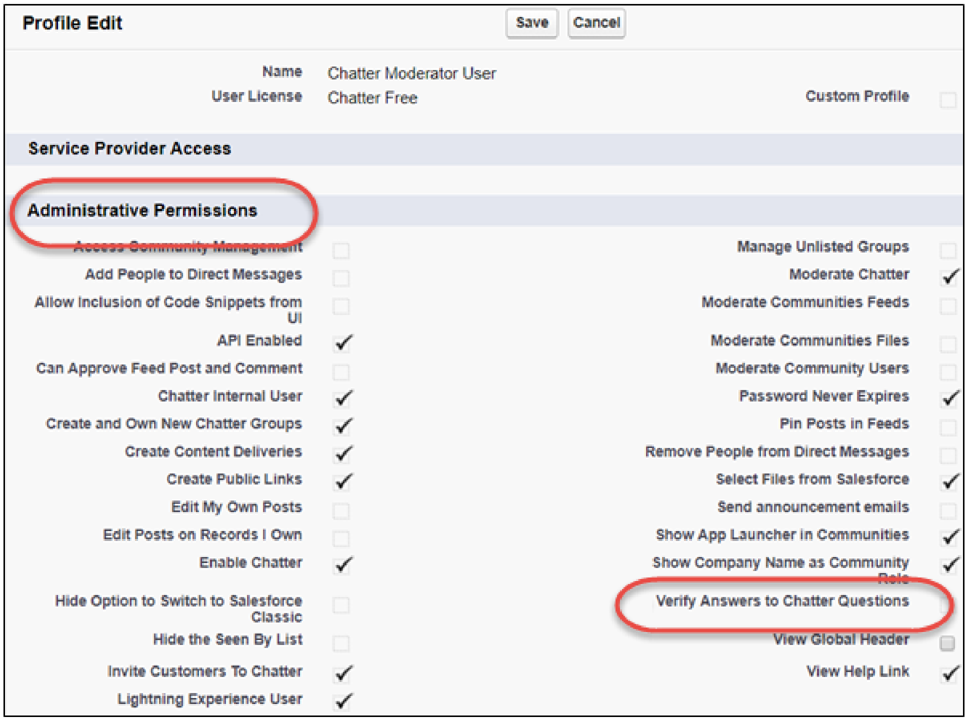
Manage Permission Set Assignments

Assign Permission to Verify Answers Through a User Profile

These steps guide you through assigning the **Verify Answers to Chatter Questions** permission through a user profile.

Assign the **Verify Answers to Chatter Questions** permission in Setup.

1. In Setup, enter `Profiles` in the `Quick Find` box, then click **Profiles** in your results.
2. Click **Edit** next to the profile you plan to use.
3. Under **Administrative Permissions**, select **Verify Answers to Chatter Questions**.



4. Click **Save**.
   All users with this profile are now able to verify answers on behalf of your company in the Experience Cloud site feeds that they have access to.

   Note: The **Company Verify** option appears on the answer overflow menu only to users with the **Verify Answers to Chatter Questions** permission.

Assign Post Pinning Permission

Let post pinning get your most critical information the best exposure. In Experience Cloud site group and topics feeds, when someone posts critical information, an authorized user can pin that post to the top of the feed. The post stays in place until an authorized user unpins it. Authorized users can pin up to three posts to the top of a feed. After you enable post pinning through your org's Chatter settings, you can assign the **Pin Posts in Feeds** permission through a permission set or a user profile.

EDITIONS

Available in: Experience Builder sites

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

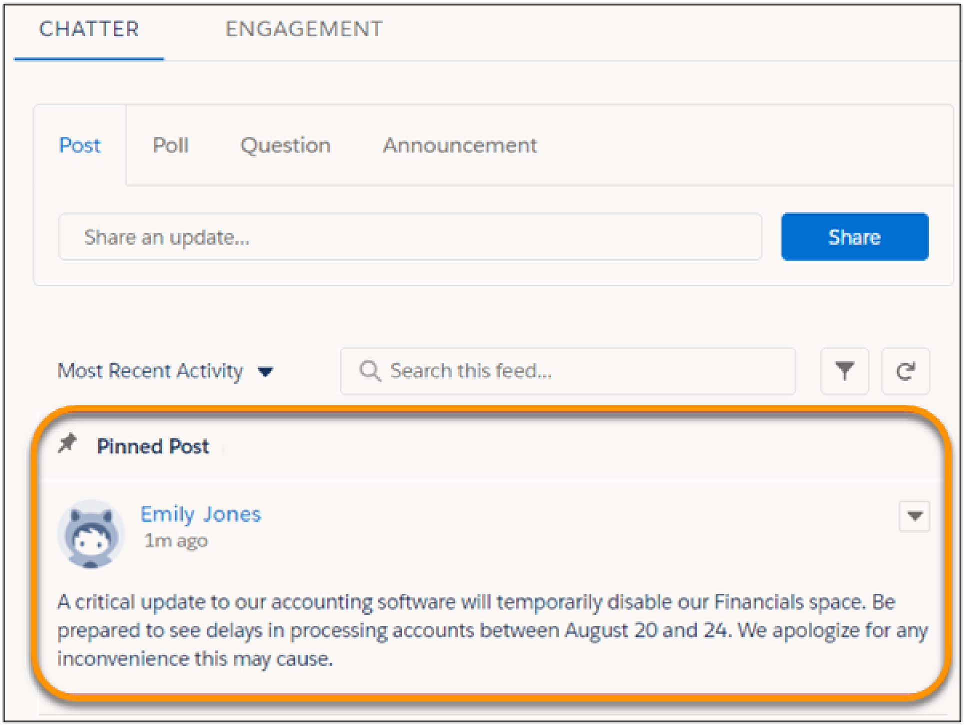
USER PERMISSIONS

To assign post pinning permission:

- Enable Chatter

  AND

  Create and Set Up Experiences



When all permissions are in place, the **Pin** option appears on a feed item's overflow menu in Experience Cloud site group and topics feeds. The **Pin** option doesn't appear on a feed item's overflow menu in the item's detail view.

Start by enabling post pinning for your org. Go to **Setup** > **Chatter Settings**, and select **Allow post pinning**. After post pinning is enabled, admins, community managers, and group owners and managers can pin posts. Admins can also assign the Pin Posts in Feeds permission to selected users. Assign post pinning permission in Setup through user profiles and permission sets.

When you pin a post, it appears twice in the feed: where it was posted and in its pinned position at the top of the feed. You can pin only the posts that were added directly to the feed. You can't pin posts that were added through an @mention.

Pinned posts are similar to announcements with these differences.

- Announcements are available only to group feeds. Post pinning is available to group and topics feeds.
- Announcements follow a linear timeline: you post it and you let it expire. Pinned posts are more flexible: you can pin posts from the past or the present.
- An announcement expires on a set date. A pinned post stays pinned until an authorized user unpins it.
- As the admin, you can choose who is authorized to pin posts. Only group owners and managers and users with the "Modify All Data" permission can post and delete group announcements.
- Authorized users can pin up to three posts to the top of a feed. You can post one announcement per group feed.
- You can add style to a pinned post with the rich text editor.

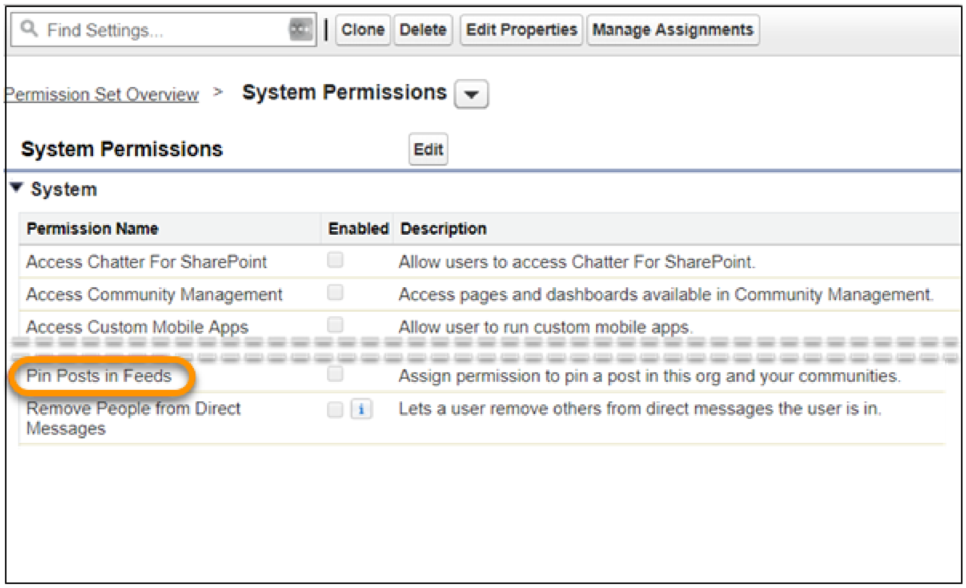
Assign Permission to Pin Posts Through a Permission Set

These steps guide you through assigning the Pin Posts in Feeds permission through a permission set.

Before you assign the Pin Posts in Feeds permission, enable post pinning for your org. Go to **Setup** > **Chatter Settings**, and select **Allow post pinning**.

Assign the Pin Posts in Feeds permission in Setup.

1. In Setup, enter `Permission Sets` in the `Quick Find` box, then click **Permission Sets** in your results.
2. Open the permission set you plan to use.
3. Open **System Permissions**, click **Edit**, and select **Pin Posts in Feeds**.



4. Click **Save**.
   If necessary, assign the permission set. You can assign permission sets to a single user from the user detail page. You can assign multiple users to a permission set from any permission set page.

   Note: The **Pin Post** option appears on the post overflow menu only to users with permission. The option appears on the post overflow menu only in the feed and not in the post's detail view.

SEE ALSO:

Manage Permission Set Assignments

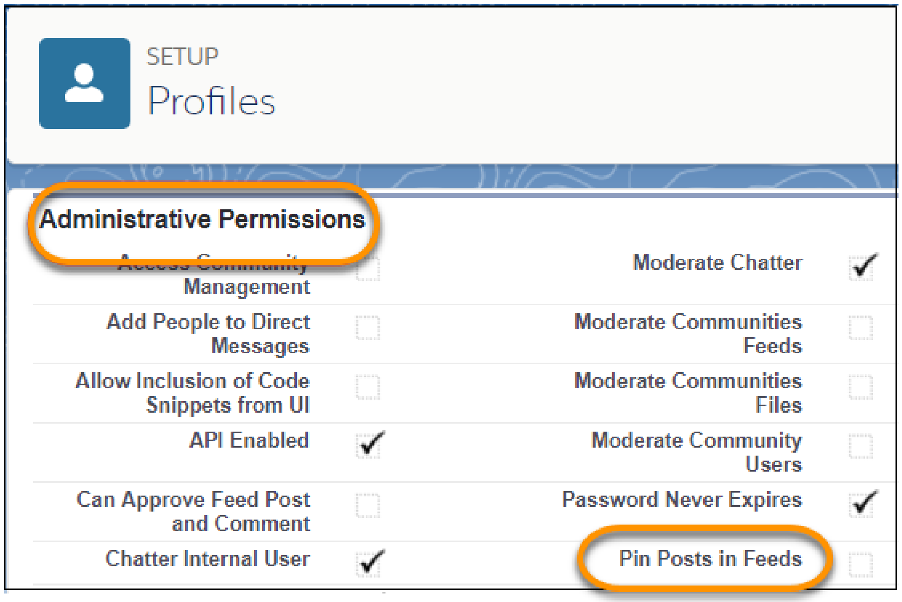
Assign Permission to Pin Posts Through a User Profile

These steps guide you through assigning the Pin Posts in Feeds permission through a user profile.

Before you assign the Pin Posts in Feeds permission, enable post pinning for your org. Go to **Setup** > **Chatter Settings**, and select **Allow post pinning**.

Assign the Pin Posts in Feeds permission in Setup.

1. In Setup, enter `Profiles` in the `Quick Find` box, then click **Profiles** in your results.
2. Click **Edit** next to the profile you plan to use.
3. Under **Administrative Permissions**, select **Pin Posts in Feeds**.



4. Click **Save**.
   Everyone assigned the edited profile can pin up to three posts to the top of the group and topics feeds that they have access to.

   Note: The **Pin Post** option appears on the post overflow menu only to users with permission. The option appears on the post overflow menu only in the feed and not in the post's detail view.

Move Feed Items from One Public Group Feed to Another

EDITIONS

Available in: Experience Builder sites in **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** editions.

USER PERMISSIONS

To move feed items from one public group feed to another

- Is a System Administrator OR has the permission
- Moderate Experiences Feeds
- AND is a member of the Experience Cloud site

In Experience Cloud sites, the **Move** option on feed item overflow menus offers a way to relocate feed items from one public group feed to another. Use Move to improve an item's visibility or to place it in a more relevant context. For example, if a user posts a Sales poll in a Marketing feed by mistake, the poll can easily be moved to the right location. System Administrators, Community Managers, and Chatter Moderators can move posts, polls, and questions.

Note: You can't move feed items into or out of public, broadcast-only groups.

When you move an item:

- Mentions are preserved.
- Announcements become announcements in the target group.
- Things that are included in or attached to the feed item stay included or attached.

  For example, moved items bring their answers, comments, replies, topics, bookmarks, attachments, and other related entities with them. If an answer is marked as best, that status is preserved.

Note: To move a post that's pinned, unpin it first.

1. Open the overflow menu on the feed item to be moved, and select **Move**.
2. In the Move Feed Item to Another Public Group dialog, search for the group to move the item to.

3. In the search results, select the target group, and then click **Move**.

The item, along with all of its related entities, is removed from the first public group and placed in the second.

Users receive notifications about the moved feed item according to their preferences. So, assuming people have opted in to the related notification setting:

- People who follow the target group are notified.
- When the person who moved the feed item is also a follower of the target group, they are notified.
- People who are mentioned in the moved feed item are notified about the mention.
- The moved item's author is not notified. The author isn't notified because, no matter their notification settings, a feed item's author isn't notified about their post actions.

SEE ALSO:

Experience Cloud Site Moderation Strategies and Tools

Assign a Default Experience to a User Profile

Assign a default experience to a user profile to associate that profile with a specific community, portal, or site. Any links in the notification lead back to the default experience—no more news from nowhere.

Assign a **Default Experience** value in Setup through Profiles.

1. In Setup, enter `Profiles` in the `Quick Find` box, then click **Profiles** in your results.
2. Click the name of the profile you want to change.
3. In the Default Experience section, click **Edit**.
4. Select an experience from the **Experience** list.
5. Click **Save**.
   All members who are assigned the user role are associated with the selected default experience. When they receive email notifications about network-agnostic objects, like accounts, cases, and opportunities, links in the notification emails lead back to the default experience. When they receive their new-user email or notifications about password resets, links in those messages also lead back to their default experience.

EDITIONS

Available in: Lightning communities, portals, and sites

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

USER PERMISSIONS

To assign a default experience to a user profile:

- Chatter Enabled

  AND

  Create and Set Up Experiences

Add Rich Publisher Apps to Your Feeds

Customize the Chatter publisher with payloads that are unique to your business process. Add a form to a post; choose from a selection of branding images; add inspiration to your feed with profound quotations. Select from the custom apps your team creates or acquires from AppExchange. Add up to five apps to the Chatter publisher.

EDITIONS

Available in: Experience Builder sites

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

USER PERMISSIONS

To add Rich Publisher Apps to the Chatter publisher:

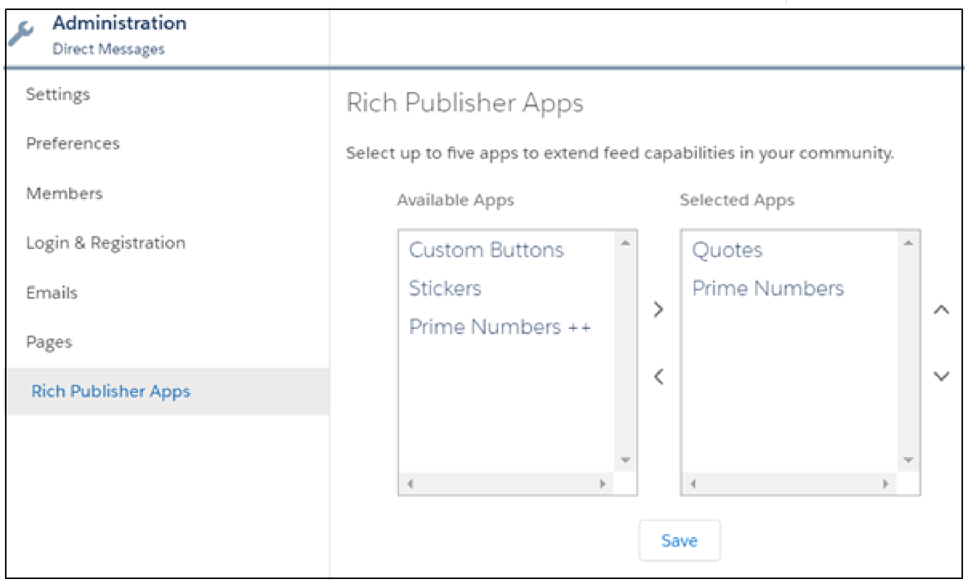
- Chatter Enabled

  AND

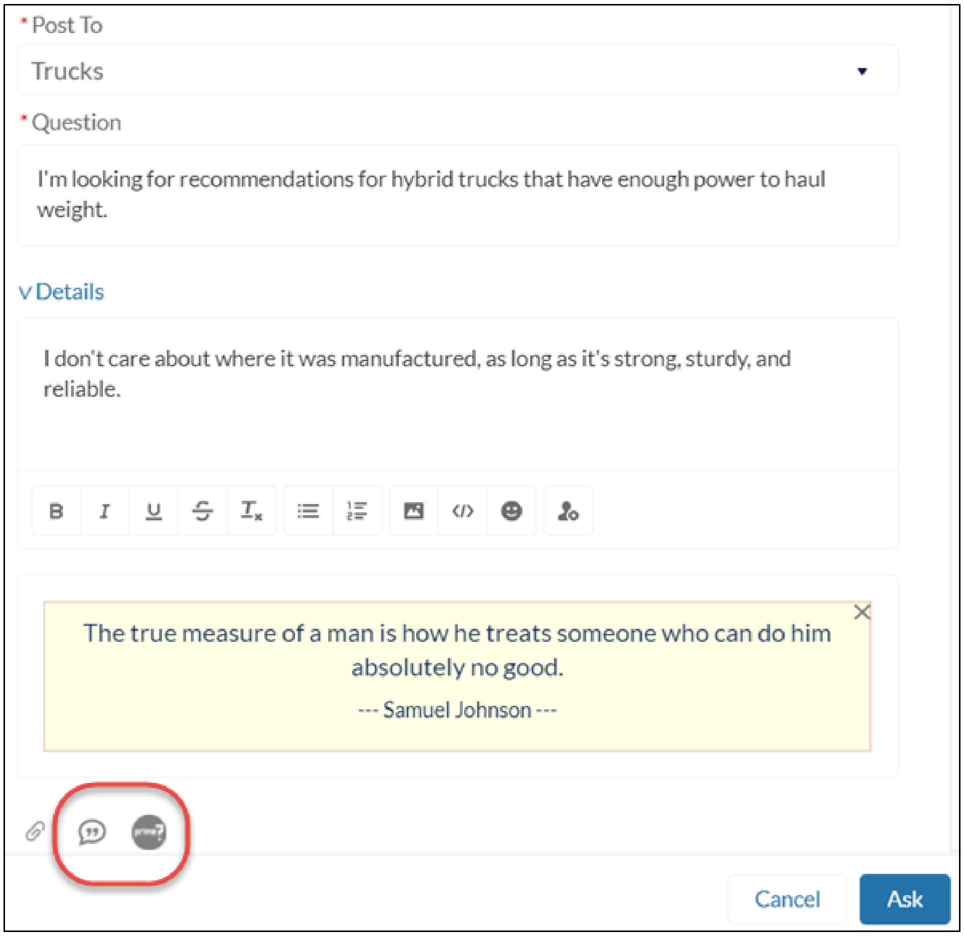
  Create and Set Up Experiences

Add Rich Publisher Apps to the Chatter publisher.

1. Go to **Experience Workspaces**.
2. Click **Administration** > **Rich Publisher Apps**.
3. Move apps between the Available Apps and Selected Apps lists.



4. Rearrange the Selected Apps list in the order you want the apps' icons to appear in the Chatter publisher.



Selected apps appear to the right of the Attach icon in the Chatter publisher. The apps appear in the order you arranged them in the Selected Apps column.

Enable Direct Messages in Your Experience Cloud Site

Allow members to send direct messages to start a private conversation with up to 16 people, including the sender. Direct messages are supported in all Experience Builder sites and in Lightning Bolt Solutions, such as the Lightning Partner Management solution.

Note: Review the limitations that apply before you enable direct messages.

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

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

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

After enablement, members can start a direct message conversation:

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

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

Note: The maximum number of people who can participate in a single direct message, including the sender, is 16. If people leave, you can add more people, up to a total of 16.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

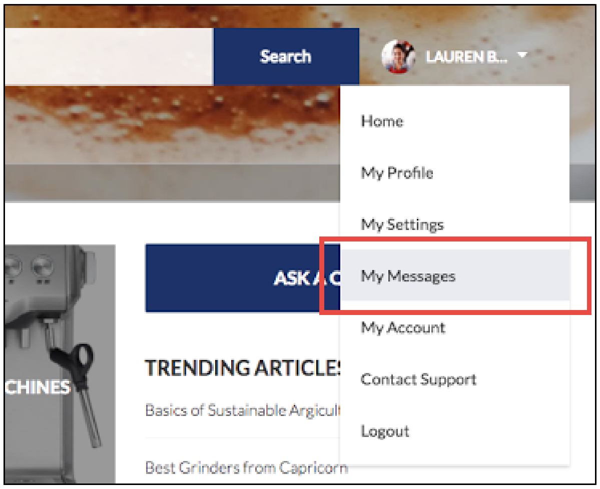
USER PERMISSIONS

To enable direct messages:
- Access Experience Management OR Manage Experiences OR Create and Set Up Experiences

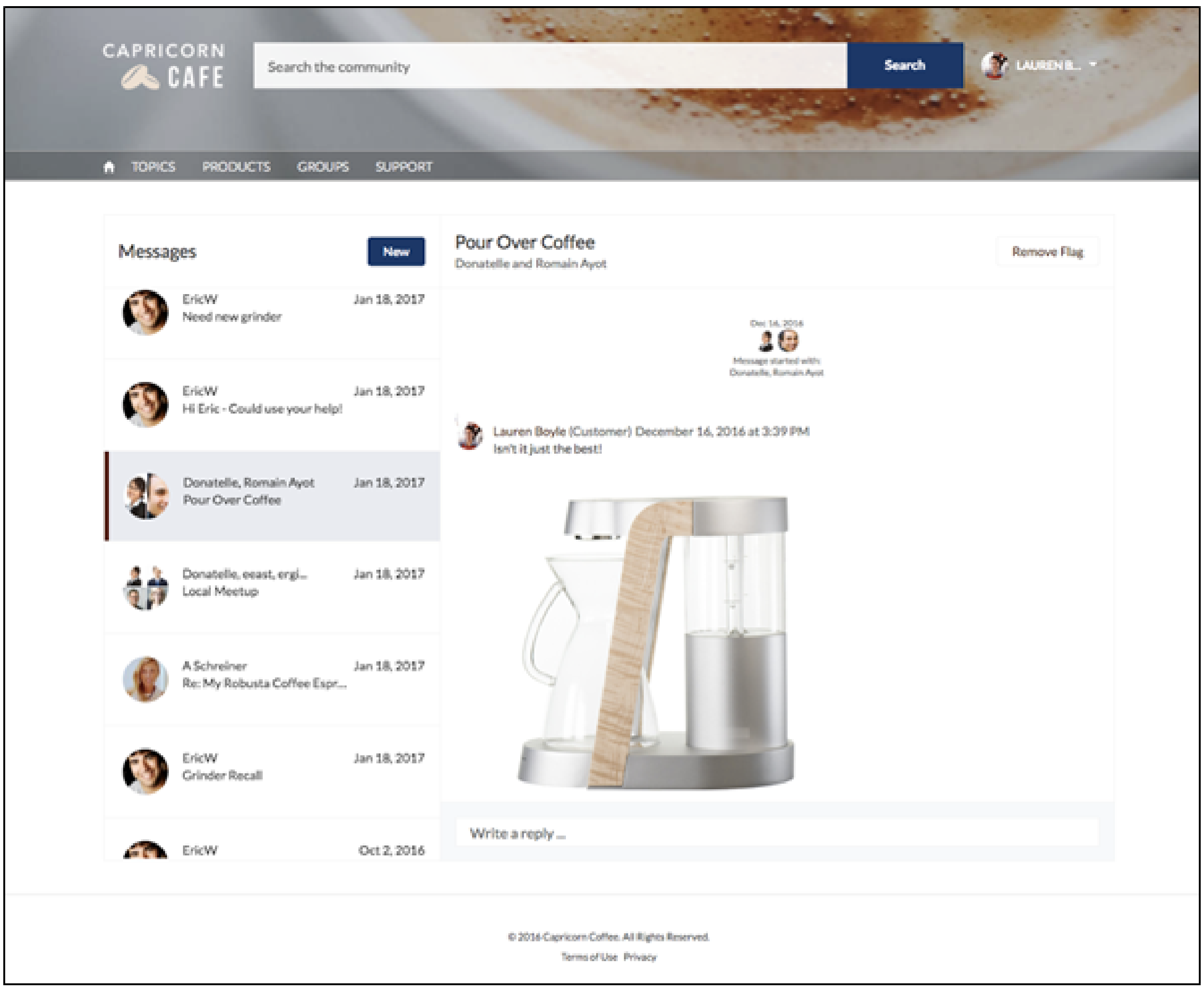
  AND

  Is a member of the Experience Cloud site

To enable Chatter:
- Customize Application



Here's what the messages list view looks like:



SEE ALSO:

Edit Pages and Components in Experience Builder

Moderate Flagged Direct Messages in Your Experience Cloud Site

Manage Your Community Email Notifications

Direct Message Limitations

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

Before you enable direct messages for your Experience Cloud site, review these considerations.

- Direct messages require that Chatter is enabled in your org.
- Direct messages can be enabled only in Experience Builder sites and in Lightning Bolt Solutions.
- Users with the View All Data and Modify All Data permissions can't access direct message data unless they are participants in the conversation.
- Only users with the Manage Chatter Messages and Direct Messages permission can view all the direct messages data in your org.
- The maximum number of people who can participate in a single direct message, including the sender, is 16. If people leave, you can add more people, up to a total of 16.
- To moderate flagged direct messages, the moderator needs the Moderate Chatter Messages and Direct Messages permission and the Moderate Experiences Chatter Messages permission.
- To maintain privacy, direct messages aren't included in search results.
- When members flag a direct message, the entire conversation is flagged. Individual messages can't be flagged.
- If you have private messages enabled, they remain available. However, direct messages are better integrated with Lightning technology. We recommend that you switch to direct messages.

For Developers

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

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

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

SEE ALSO:

Enable Direct Messages in Your Experience Cloud Site

Set Up Question-to-Case

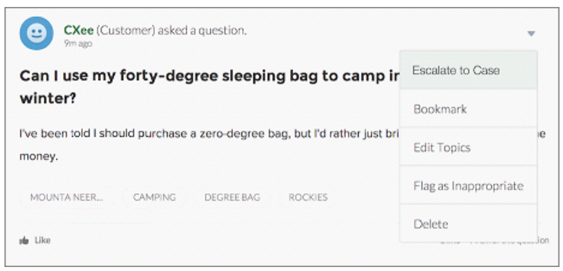
Add Question-to-Case to your Experience cloud sites, your Salesforce org, or both.

EDITIONS

Available in: Salesforce Classic

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

Question-to-Case lets moderators create cases from unresolved questions in Chatter, which makes it easier to track and resolve your customers' issues. Moderators can create cases from questions directly in the feed, or you can set up processes—similar to workflow rules—in 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.



Question-to-Case is available only in Experience Cloud sites where Chatter Questions is enabled.

IN THIS SECTION:

1. Question-to-Case Overview

   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 your Salesforce org and Salesforce mobile web, as well as in Experience Cloud sites where Chatter Questions is enabled.

2. Enable Question-to-Case

   Question-to-Case lets moderators create cases from questions in Chatter. Creating cases from questions ensures that your customers' questions are quickly resolved. Enable Question-to-Case in your Experience Cloud sites, Salesforce org, or both.

3. Add the Question from Chatter Field to the Case Detail View

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

4. Add the Escalate to Case Action to the Feed Item Layout

   Give moderators the ability to create cases from questions by adding the Escalate to Case action to Chatter Questions pages. This action is created automatically when Question-to-Case is enabled in your organization.

5. Confirm Access to the Escalate to Case Action

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

6. Customize the Escalate to Case Action Layout
   Choose which fields appear on the Escalate to Case action, and in what order, based on the information you need to track for each case.
7. Automatically Assign Cases from Questions to a Queue
   Case assignment rules aren't supported in Question-to-Case, so by default, cases created from questions are assigned to the moderator who escalates the question. You can write a workflow rule or process that automatically adds cases that were created from questions to a queue so agents can claim them.
8. Automatically Create Cases from Unresolved Questions in Chatter
   As your Experience Cloud site or org develops, ensure that users get speedy answers to their questions. Question-to-Case lets moderators escalate unresolved questions to cases in the feed, but you can make your case resolution process even more efficient by setting up processes—similar to workflow rules—in Process Builder. Set up a process that automatically creates a case from questions that meet specified criteria.
9. Create a Case from a Question in Chatter
   If a question in Chatter hasn't been resolved, moderators can create a case from the question. Question-to-Case must be enabled in your org or Experience Cloud site.

Question-to-Case Overview

EDITIONS

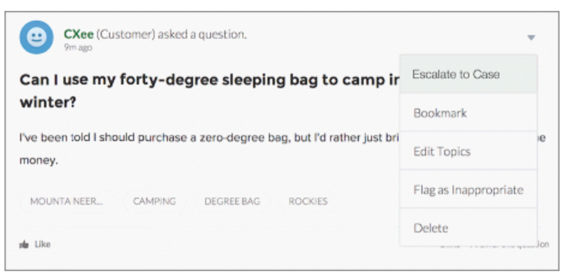
Available in: Salesforce Classic

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

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 your Salesforce org and Salesforce mobile web, as well as in Experience Cloud sites where Chatter Questions is enabled.

When a customer uses the Question action in Chatter to ask a question, similar questions and Knowledge articles appear below the Chatter publisher. If the similar questions and articles don't address the issue, the customer posts the question.

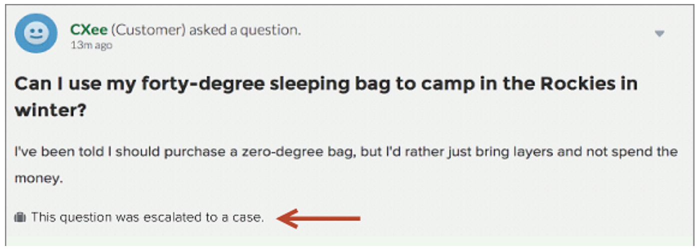
If a question isn't resolved, you can escalate the question to a case. Users with the Moderate Chatter or Moderate Experiences Feeds user permission can create cases from questions directly in the feed, or you can set up processes—similar to workflow rules—in Process Builder to automatically create cases from questions that meet specified criteria. Cases from questions are added to a queue so support agents can claim them.



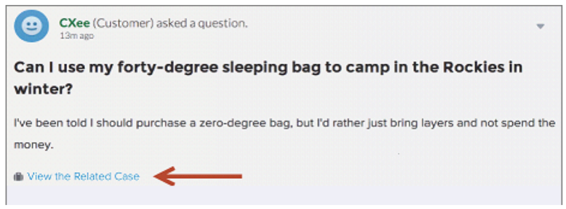
When a customer's question is turned into a case, the customer receives an email with the case number and a link to the case. The customer can view the case via a link on the question that's visible only to them, while moderators see a note on the question indicating that a case was created.

Note: The person who asked the question must have access to cases so they can view their case.

Moderator Flag

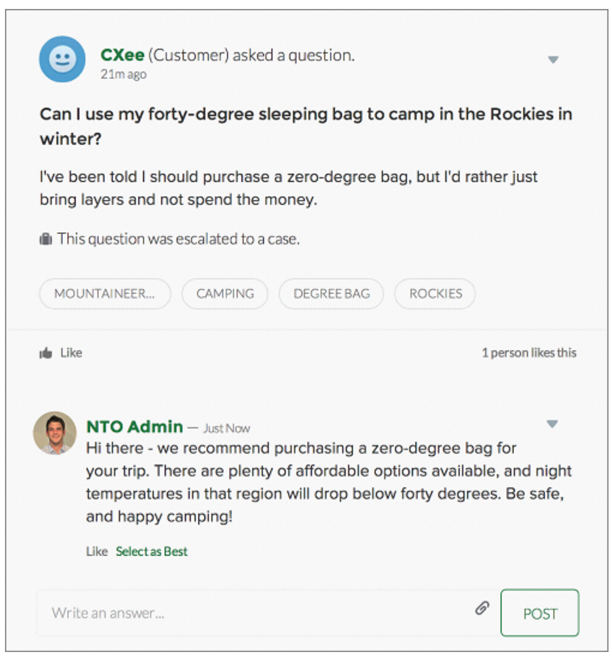


Customer Flag



Note: On escalated questions in Salesforce (as opposed to Experience Cloud sites), the notification is visible to all users, not just moderators.

When agents find a solution, they can respond to questions directly from the console, 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 Experience Cloud site, or only to the customer who asked the question.



To get started, see Set Up Question-to-Case.

Enable Question-to-Case

Question-to-Case lets moderators create cases from questions in Chatter. Creating cases from questions ensures that your customers' questions are quickly resolved. Enable Question-to-Case in your Experience Cloud sites, Salesforce org, or both.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To enable Question-to-Case:
- Customize Application

1. From Setup, enter *`Support Settings`* in the `Quick Find` box, then select **Support Settings**.
2. To enable Question-to-Case in all Experience Cloud sites where you have enabled Chatter Questions, select **Enable Question-to-Case in Experience Cloud Sites**.
3. To enable Question-to-Case in your Salesforce org, select **Enable Question-to-Case in Salesforce**.
4. Click **Save**.

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

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

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

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To set field-level security:
- Manage Profiles and Permission Sets

  AND

  Customize Application

To customize page layouts
- Customize Application

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

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

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

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

SEE ALSO:

Find Object Management Settings

Add the Escalate to Case Action to the Feed Item Layout

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To edit page layouts:
- Customize Application

Give moderators the ability to create cases from questions by adding the Escalate to Case action to Chatter Questions pages. This action is created automatically when Question-to-Case is enabled in your organization.

1. From Setup, enter *`Feed Item`* in the `Quick Find` box, then select **Feed Item Layouts**.
2. Click **Edit** next to Feed Item Layout.
3. Drag the Escalate to Case action from the Quick Actions category in the palette to the Quick Actions in the Salesforce Classic Publisher section.
4. Click **Save**.
5. Click **Page Layout Assignments** to confirm that the user profiles that need Question-to-Case are assigned to the Feed Item Layout.

Confirm Access to the Escalate to Case Action

EDITIONS

Available in: Salesforce Classic

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

Record types available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To assign record types:
- Customize Application

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

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

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

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

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

Customize the Escalate to Case Action Layout

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

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

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

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To customize page layouts:
- Customize Application

Automatically Assign Cases from Questions to a Queue

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

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

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

To learn how to create a queue, see Create Queues.

EDITIONS

Available in: Salesforce Classic

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

Automatically Create Cases from Unresolved Questions in Chatter

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

Important: These steps apply only to orgs and Experience Cloud sites that use Chatter Questions. Not sure if that's you? See Differences Between Q&A Features in Salesforce.

You can use Question-to-Case in processes in several ways. For example, consider setting up processes that:

- Create a case from a question if a week has passed, the question has received more than 10 likes, and a best answer hasn't been selected.
- Create a case from a question immediately if the question contains the word "competitor."

EDITIONS

Available in: Salesforce Classic

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

Process Builder is available in: **Essentials**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Processes related to Question-to-Case act on the Feed Item object. The process includes a flow that evaluates whether question posts meet your escalation criteria. You can create flow variables based on several Feed Item fields, including:

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

Tip:

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

Create a Case from a Question in Chatter

If a question in Chatter hasn't been resolved, moderators can create a case from the question. Question-to-Case must be enabled in your org or Experience Cloud site.

1. Navigate to the question in the feed.
2. Select **Escalate to Case** in the action drop-down menu.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create a case from a question in Salesforce:

- Moderate Chatter OR Modify All Data

  AND

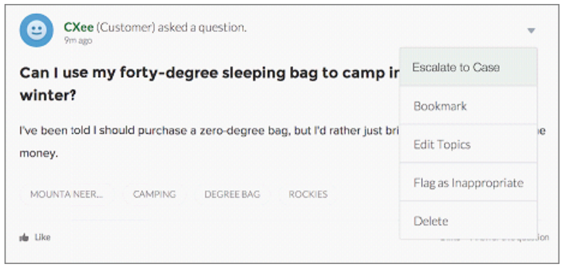
  Create on cases

To create a case from a question in an Experience Cloud site:

- Moderate Chatter OR Modify All Data OR Moderate Experiences Feeds

  AND

  Create on cases



A window appears that's pre-populated with the case subject, contact, and description. Unless Question-to-Case has a queue associated with it, the case is automatically assigned to you.

3. If needed, edit the case details.
4. Create the case.

After a case is created from a Chatter question, the customer who asked the question receives an email notifying them that a case was created from their question. The email provides the case number and a link to the case.

Agents can post a response to the question directly from the case feed using the action in the publisher. Agents choose who can view the response by selecting either "Customer Only" or "Everyone". They can also navigate to the original question from the case's detail page by clicking the link in the `Question from Chatter` field.

Enable Salesforce Knowledge in Your Experience Cloud Site

USER PERMISSIONS	
To customize an Experience Cloud site:	• Be a member of the site AND Create and Set Up Experiences • OR • Be a member of the site AND an experience admin, publisher, or builder in that site
To publish an Experience Cloud site:	• Be a member of the site AND Create and Set Up Experiences • OR • Be a member of the site AND an experience admin or publisher in that site
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

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Experience Cloud sites are available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions. The Help Center template is available in **Essentials** Edition.

Salesforce Knowledge is available in: **Performance** and **Developer** Editions and in **Unlimited** Edition with the Service Cloud.

Salesforce Knowledge is available for an additional cost in **Enterprise** and **Unlimited** Edition.

Enable Salesforce Knowledge to quickly get articles to your customers and agents in an Experience Cloud site. Knowledge articles provide accurate information to customers when and where they need it.

Note:

- Your Salesforce org needs at least one Salesforce Knowledge license to enable and set up Salesforce Knowledge.
- Salesforce Tabs + Visualforce site members without the Knowledge One permission can't access Salesforce Knowledge through sites. They also can't access Salesforce Knowledge in sites via Salesforce for Android or Salesforce for iOS.

If you haven't yet, check out Salesforce Knowledge. After setting up your knowledge base, either in Salesforce Classic or Lightning Experience, complete the following steps to view articles in your Experience Cloud sites.

1. Update profiles to give users Read permissions:
   a. In Setup, enter `Profiles` in the Quick Find box, and then click **Profiles**.
   b. To enable the Read permission, either clone the Customer Community User, Customer Community Plus User, or Partner Community User profiles, or use a permission set. Give Read permission for the article types (Salesforce Knowledge in Classic) or record types (Lightning Knowledge) that you want to share with users.
   c. Give Read permissions to each guest user profile you'd like to have access to Salesforce Knowledge.

      Note: There are a few reasons why a user can't find an article: it's deleted, archived, doesn't exist, or the user doesn't have the access to view it. When an article isn't available, guest users are directed to a login page and logged-in users see an "Invalid Page" error.

2. If you want your 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 profile's data category visibility.
3. From Setup, enter `Topics for Objects` in the Quick Find box, then select **Topics for Objects**.
   a. In Classic Knowledge, enable topics for all the article types you want to include.
   b. In Lightning Knowledge, enable topics for Knowledge.
4. Salesforce Knowledge uses data categories to organize content. Experience Builder sites use topics. You can easily map the articles in your data categories to topics in a site. To map articles to topics automatically:
   a. In Experience Workspaces, click **Content Management** > **Topics** > **Automatic Topic Assignment**.
   b. After enabling Automatic Topic Assignment, map topics to data category groups and data categories. You can choose to add the topics to all the articles existing in data categories, and to articles added in the future. You can map your exact hierarchy from data categories to topics, up to eight levels of depth.
5. Map articles to topics automatically.
6. Enable thumbs-up and thumbs-down voting on articles so you can identify helpful articles and ones that need improvement.
   a. In Experience Builder, navigate to the Article Detail page.
   b. To view and Article Content component's properties, click it.
   c. In the property editor, select **Allow voting on articles**.

d. Publish your changes.

SEE ALSO:

Salesforce Knowledge

Build Your Knowledge Base in Salesforce Classic

Hide Fields in Lightning Knowledge Search Results

EDITIONS

Available in: Lightning Experience

Salesforce Knowledge is available in **Essentials** and **Unlimited** Editions with Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Professional**, **Enterprise**, **Performance**, and **Developer** Editions. For more information, contact your Salesforce representative.

When you display Knowledge search results in a grid layout, you can adjust the Knowledge search layout for different user profiles. Use this capability to hide some of the information that's returned in results from different user profiles.

To use this feature, Salesforce Knowledge must be enabled in your org.

1. Open your site's Administration Workspace.
2. Go to **Preferences** > **General**, and select the **Use a profile-based layout for Lightning Knowledge search results** checkbox.
3. Click **Save**.
4. Go to Object Manager, and click **Knowledge**.
5. Click **Search Layouts**.
6. Click a user profile, and remove the information that you want to hide.

   Repeat step 6 for each user profile that you want to change.

Enable Ideas in Your Experience Cloud Site

EDITIONS

Available in: Salesforce Classic not available in all orgs

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

USER PERMISSIONS

To customize Ideas settings:
- Customize Application

To view Ideas:
- Read on Ideas AND Read on Idea Themes

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

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

1. From Setup, enter *`Ideas Settings`* in the `Quick Find` box, then select **Ideas Settings**
   a. To enable Ideas for your org, select the `Enable Ideas` checkbox.

      Once you enable the HTML editor, you can't disable it.

   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.
   c. Ensure that the multi-select `Categories` field is enabled by clicking the **Enable** button located below the Categories message at the top of the page. This button is not displayed if your organization already has the `Categories` field enabled.
   d. To let Ideas members associate more than one category with an idea, select `Enable Categories`. Once you enable multi-select categories, you can't disable it.
   e. To let users earn points and ratings based on their activity in each zone, select `Enable Reputations`.

f. In the `Half-Life (in Days)` field, enter the number of days.

   The half-life setting determines how quickly old ideas drop in ranking on the Popular Ideas subtab, to make room for ideas with more recent votes. A shorter half-life moves older ideas down the page faster than a longer half-life.

2. Define and customize fields for Ideas:
   a. Define picklist values for the `Categories` and `Status` fields.

      Make sure that you add the categories and statuses to the zones you'll be including in the Experience Cloud site.
   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 org.
5. Create one or more zones to organize ideas into logical groups, and associate the zones with the Experience Cloud iste.
6. Customize your Ideas page layouts to display the information you want to see.
7. Create validation rules that prevent offensive language from being used in the zone
8. Set up Apex triggers and validation rules for comments on ideas.
9. Enable user profiles for members and moderators and ensure the profiles can access Ideas.

   Important: To view Ideas, guest user profiles created after October 1, 2018 must have the Read on Ideas and Read on Idea Themes user permissions manually enabled.
10. Add the Ideas tab and the Idea Themes tab to the site.

SEE ALSO:

Enable and Customize Ideas Settings

Set Up Approvals for External Users in Your Experience Cloud site

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To create, edit, delete, or clone approval processes:
- Customize Application

To create or change queues:
- Customize Application

  AND

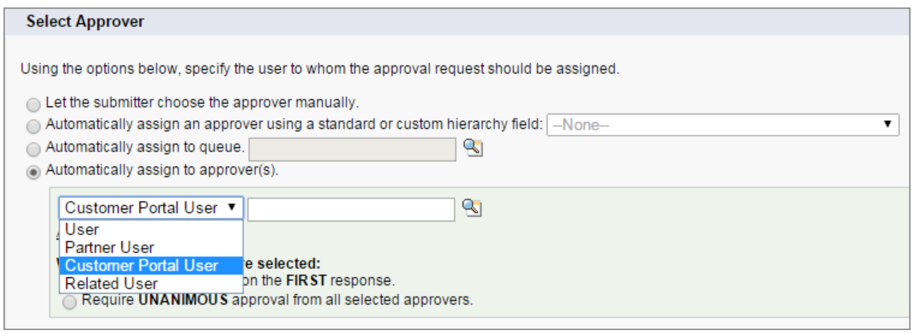
  Manage Public List Views

An approval process automates how records are approved in Salesforce. An approval process specifies each step of approval, including who to request approval from and what to do at each point of the process. Customer Community Plus and Partner users in your Experience Cloud site can be assigned as approvers on records or added directly to queues. They can see and take action through the My Approvals and Approval History related lists on the record. Approvals can also be triggered directly from the site's feed.

Note:
- Users with high-volume licenses, such as High Volume Customer Portal and Authenticated Website, can't approve records.
- External users with legacy portal licenses can approve records in Experience Cloud site, but not in legacy portals created before 2013.

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

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



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

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

SEE ALSO:

Set Up an Approval Process

Approval Limits

Create Queues

Enable Analytics in Your Experience Cloud Site

Enable Analytics for Experience Cloud sites to allow your partner and customer users to view and explore Analytics dashboards.

> Note: Only users with a Customer Community Plus, Partner Community, or Lightning External Apps Plus license can use this feature. This feature is supported in Experience Cloud sites but not in portals.

Complete the following steps to share Analytics dashboards in your Experience Cloud site.

1. Set up Analytics in your Salesforce org, as described in the Analytics Platform Setup section.
2. Enable Analytics for Communities and set up site members. See Enable Analytics for Communities.
3. In Analytics, create dashboards and save them in an Analytics app. Designate that app for sharing with the community. For more information about working with Analytics, refer to the Analytics Library.
4. Embed your Analytics dashboards using either Experience Builder or Visualforce.
5. From the Analytics app containing your dashboards, give access to site members by selecting **Share**. In the Share dialog, select **Enable sharing with Communities**. Invite site partners and customers to share the app.

For information, see Share Analytics with Communities.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Analytics is available for an extra cost in: **Enterprise**, **Performance**, and **Unlimited** Editions. Also available in: **Developer Edition**

USER PERMISSIONS

To create, customize, or activate an Experience Cloud site:

- Create and Set Up Experiences

  AND is a member of the site they're trying to update

To modify Analytics settings:

- Analytics Growth permission set license with Manage Analytics permission

To view, explore, and share embedded Analytics dashboards:

- Analytics for Communities permission set license with View Analytics on Experience Cloud Site Pages permission

Additional Experience Cloud Site Limitations

Here are a few limitations when using features in Experience Cloud sites.

- Drag-and-drop scheduling using events and calendars is not available in Experience Cloud sites.
- Channel Programs and Market Development Fund object list views and records don't display on Salesforce for iOS.
- Partner users can't create account teams and add members to them.
- Partner users can't edit or delete members of an account shared with them by an internal user.
- The default account teams option is not available for Experience Cloud sites.
- Partner and portal users don't receive emails to notify them of upcoming tasks. Reminder notifications are displayed on the bell icon.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

Deploy an Experience Cloud Site from Sandbox to Production

We recommend creating, customizing, and testing your Experience Cloud site in a test environment, such as a sandbox, before deploying it to your production org. When testing is complete, you can use change sets or Metadata API to migrate your site from one org to another. Deciding whether to use change sets or MD API depends on several factors. Some things to consider are the complexity of the changes that you're migrating, your level of comfort with developer tools, and the application lifecycle management (ALM) model that you're using.

Tip: To learn more about the ALM models and development options available to you, check out Determine Which Application Lifecycle Management Model Is Right for You on Trailhead.

Note: Lightning Bolt Solutions aren't suitable for deploying Experience Cloud sites between your orgs. Use a Lightning Bolt Solution to share or sell a solution on AppExchange or implement a site with a turnkey solution or new look.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

Change Sets

If you're more comfortable working with point-and-click tools, change sets are your deployment friend. A change set represents a set of customizations in your org (or metadata components) that you can deploy to a connected org.

You can manage your application using declarative tools. You don't have to use a command-line interface or a version control system to meet your customization needs. You use the Setup menu to create changes in a development environment. You then migrate the changes between environments as you work through the ALM steps.

Your release artifact is a set of metadata changes relative to what's in the production org. What gets released is only metadata that has been added or changed—if it doesn't change, it's not in the release.

Metadata API

If you're up to speed on Metadata API and more comfortable in the world of code, use Metadata API to deploy changes programmatically. You can retrieve, deploy, create, update, and delete customization information for your org, such as Experience Cloud sites, custom object definitions, and page layouts.

Using Metadata API is ideal when your changes are complex or when you need a more rigorous change management process and an audit process (or version control system) to manage multiple work streams.

As with the change set process, the release artifact that you create is a set of metadata changes relative to your production org.

Tip: Some Experience Cloud site settings and features aren't yet supported in Metadata API, so you have to migrate them manually between environments. Remember to track these changes so that you don't forget to migrate them.

IN THIS SECTION:

Deploy Your Experience Cloud Site with Change Sets

USER PERMISSIONS	
To customize or publish an Experience Cloud site:	Create and Set Up Experiences
To edit deployment connections and use inbound change sets:	Deploy Change Sets AND Modify All Data Note: If a user requires access only to metadata for deployments, you can enable the Modify Metadata Through Metadata API Functions permission. This permission gives such users the access they need for deployments without providing access to org data. For details, see "Modify Metadata Through Metadata API Functions Permission" in Salesforce Help.
To use outbound change sets:	Create and Upload Change Sets, Create AppExchange Packages, AND Upload AppExchange Packages

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

Use change sets to move your Experience Cloud site between related orgs that have a deployment connection, such as your sandbox and production orgs. Create, customize, and test your site in your test environment and then migrate the site to production when testing is complete.

You can use change sets to move Experience Builder and Salesforce Tabs + Visualforce sites using the Network component type.

1. Create and test your site in your preferred test org, such as sandbox.
2. From Setup in your test org, enter `Outbound Change Sets` in the Quick Find box, and then select **Outbound Change Sets**.
3. Create a change set, and click **Add** in the Change Set Components section.
4. Select the **Network** component type, choose your site, and then click **Add to Change Set**.
5. To add dependent items, click **View/Add Dependencies**. We recommend selecting all the dependencies listed.

Tip:
- For navigation menus that link to standard objects, custom list views aren't included as dependencies. Manually add the custom list view to your change list.
- Manually add new or modified profiles or permission sets referenced in **Administration** > **Members**.
- The list of dependencies has two Site.com items—`MySiteName` and `MySiteName1`. `MySiteName` holds the various Visualforce pages that you can set in Administration in Experience Workspaces. `MySiteName1` includes the pages from Experience Builder.

6. Click **Upload** and select your target org, such as production.

   Make sure that the target org allows inbound connections. The inbound and outbound orgs must have a deployment connection.
7. From Setup, select **Inbound Change Sets** and find the change set that you uploaded from your source org.
8. Validate and deploy the change set to make it available in the target org.

   Warning: When you deploy an inbound change set, it overwrites the site in the target org.
9. Manually reconfigure any unsupported items in the target org site.
10. Add data for your site, and test it to make sure that everything works as expected. Then publish your changes to go live.

IN THIS SECTION:

Considerations for Deploying Experience Cloud Sites with Change Sets

Keep the following considerations and limitations in mind when migrating your Experience Builder or Salesforce Tabs + Visualforce site with change sets.

SEE ALSO:

Considerations for Deploying Experience Cloud Sites with Change Sets
Change Sets Best Practices
Upload Outbound Change Sets
Deploy Inbound Change Sets

Considerations for Deploying Experience Cloud Sites with Change Sets

Keep the following considerations and limitations in mind when migrating your Experience Builder or Salesforce Tabs + Visualforce site with change sets.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

General

- When you deploy an inbound change set, it overwrites the Experience Cloud site in the target org. So although you can't use a change set to delete a component, you can delete the pages within an Experience Builder site. For example, let's say you delete pages from an Experience Builder site in sandbox and then create an updated outbound change set. When you redeploy the change set in a target org, such as production, the pages are also deleted there.
- If you update the Experience Cloud site template in the source org, ensure that you also update the template in the target org before deploying the change set.
- You can't deploy to a target org that's using an earlier release version. For example, if your source org is on Summer '19 (API version 46.0), you can't deploy to a target org on Spring '19 (API version 45.0).

Administration

Administration settings are in Experience Workspaces.

- Remember to add any new or modified profiles or permission sets referenced in **Administration** > **Members** to your outbound change set. They're not automatically included as dependencies.
- For Experience Cloud sites created in a sandbox org before the Summer '17 release, you must resave administration settings before migration to transfer them successfully.
- Until you publish your site in the target org, settings for the change password, forgot password, home, self-registration, and login pages appear to return to their default values.
- To update settings in the Members area and the Login & Registration area, you must deploy the changes in separate change sets. First update and deploy the Members area setting, and then update and deploy the Login & Registration settings.

Navigation Menu

The Navigation Menu component is available in Experience Builder sites.

- For menu items that link to objects, list views are reset to the default list view. Also, custom list views for standard objects aren't included as dependencies.
- Deploying the navigation menu with additional menu items deletes any translations applied to existing menu items in the target environment.

Recommendations

- Updates to recommendation names aren't supported. If you change the name of a recommendation in the source org having previously migrated it, the target org treats it as a new recommendation.
- Recommendation images aren't supported.
- When you deploy an inbound change set, it overwrites the target org's scheduled recommendations with recommendations from the source org.

Unsupported Settings and Features

The following items aren't supported. Manually add them after you deploy the inbound change set.

- Navigational and featured topics
- Audience targeting
- Dashboards and engagement
- Recommendation images
- Branding panel images in Experience Builder
- The following Administration settings in Experience Workspaces:
  - The Account field in the Registration section of the Login and Registration area
  - The **Select which login options to display** option in the Login section of the Login and Registration area
  - The Settings area

– The Rich Publisher Apps area

SEE ALSO:

Change Sets Best Practices

Change Sets Implementation Tips

Deploy Your Experience Cloud Site with Change Sets

Deploy Your Experience Cloud Site with the Metadata API

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

Use Metadata API to move your Experience Cloud site from one Salesforce org to another. Set up and test your site in your test environment, and then retrieve the site's data and deploy it to your production org.

You can use Metadata API to move Experience Builder and Salesforce Tabs + Visualforce sites.

The following metadata types combine to define a site. To successfully migrate a site, use the Metadata API `retrieve` call to retrieve XML file representations of your org's components.

- **Network**—Represents an Experience Cloud site. Contains administration settings, such as page override, email, and membership configurations.
- **CustomSite**—Contains the domain and page setting information, including `indexPage`, `siteAdmin`, and URL definitions.
- **ExperienceBundle** *or* **SiteDotCom**—If you're deploying an Experience Builder site, we recommend using ExperienceBundle instead of SiteDotCom. ExperienceBundle provides text-based representations of the different Experience Builder settings and site components, such as pages, branding sets, and themes, that make up an Experience Builder site.

  Before the Summer '19 release (API version 45.0 and earlier), the Network, CustomSite, and SiteDotCom metadata types combined to define an Experience Builder site. However, retrieving the SiteDotCom type produces a binary `.site` file that isn't human readable. By enabling the ExperienceBundle type, you can retrieve editable site metadata, and quickly create, update, publish, and deploy Experience Builder sites programmatically. See ExperienceBundle for Experience Builder Sites.

For additional information on these metadata types and instructions on migrating data, see the *Metadata API Developer Guide* and the *Salesforce CLI Command Reference*.

Tips and Considerations

- Before migrating data to another org, enable digital experiences in the destination org and enter the same domain name that you used in your sandbox org to avoid getting an error.
- For each Experience Cloud site, the network component has a unique name and URL path prefix. When you retrieve the network component, the generated XML file name is based on the name of the network. When migrating, the API looks at the file name and if it exists, updates the site. If it doesn't exist, the API creates a site. If someone changes the site name in the sandbox and then tries to migrate, they see an error because the API is trying to create a site with the existing path prefix.
- Examine the XML file for CustomSite to make sure that all dependencies are brought over. If any are missing, explicitly state them in the XML file.
- In addition to the Network, CustomSite, and ExperienceBundle components, include all the other components required by your site, such as custom objects, custom fields, custom Lightning components, and Apex classes.
- To deploy the Network and Profile components using unlocked packages, create a separate unlocked package for each component and deploy them individually.

- When deploying an Experience Builder site with ExperienceBundle, ensure that the SiteDotCom type isn't included in the manifest file.
- If you rename a site in **Administration** > **Settings**, make sure that the source and target sites have matching values for the `picassoSite` and `site` attributes in the `Network` component.
- If there are any changes to the guest user profile, include the profile as part of the site migration.
- When you migrate user profiles, users are added to the site in the production org. Emails are then sent to members in the same way as for any new site.
- During deployment, make sure that the `NavigationMenu` developer name in the target org is the same as the developer name in the source org.
- If the containerType is CommunityTemplateDefinition, you can't update an existing `NavigationMenu` via Metadata API.
- Deploying the navigation menu with additional menu items deletes any translations applied to existing menu items in the target environment.
- You can't deploy to a target org that's using an earlier release version. For example, if your source org is on Summer '19 (API version 46.0), you can't deploy to a target org on Spring '19 (API version 45.0).
- `NavigationLinkSet` was deprecated in Winter '20 (API version 47.0) and replaced by `NavigationMenu`.
- ExperienceBundle doesn't support retrieving and deploying across different API versions. If you're trying to upgrade ExperienceBundle metadata from an earlier API version to a later one—for example, from API version 48.0 to 49.0—take the following steps:
  1. Set the API version in the package.xml manifest file to 48.0 and deploy the package.
  2. Then, set the API version in package.xml to 49.0.
  3. Retrieve the package to get the latest ExperienceBundle updates.

Sample Template

The following sample contains all the fields that you can migrate through the Metadata API.

```
<?xml version="1.0" encoding="UTF-8"?>
<Network xmlns="http://soap.sforce.com/2006/04/metadata">
    <allowInternalUserLogin>true</allowInternalUserLogin>
    <allowMembersToFlag>true</allowMembersToFlag>
    <allowedExtensions>txt,png,jpg,jpeg,pdf,doc,csv</allowedExtensions>
   <caseCommentEmailTemplate>unfiled$public/ContactFollowUpSAMPLE</caseCommentEmailTemplate>


<changePasswordTemplate>unfiled$public/CommunityChangePasswordEmailTemplate</changePasswordTemplate>

    </communityRoles>
    <disableReputationRecordConversations>true</disableReputationRecordConversations>
    <emailSenderAddress>admin@myorg.com</emailSenderAddress>
    <emailSenderName>MyCommunity</emailSenderName>
    <enableCustomVFErrorPageOverrides>true</enableCustomVFErrorPageOverrides>
    <enableDirectMessages>true</enableDirectMessages>
    <enableGuestChatter>true</enableGuestChatter>
    <enableGuestFileAccess>false</enableGuestFileAccess>
    <enableInvitation>false</enableInvitation>
    <enableKnowledgeable>true</enableKnowledgeable>
    <enableNicknameDisplay>true</enableNicknameDisplay>
    <enablePrivateMessages>false</enablePrivateMessages>
    <enableReputation>true</enableReputation>
```

```
    <enableShowAllNetworkSettings>true</enableShowAllNetworkSettings>
    <enableSiteAsContainer>true</enableSiteAsContainer>
    <enableTalkingAboutStats>true</enableTalkingAboutStats>
    <enableTopicAssignmentRules>true</enableTopicAssignmentRules>
    <enableTopicSuggestions>true</enableTopicSuggestions>
    <enableUpDownVote>true</enableUpDownVote>

<forgotPasswordTemplate>unfiled$public/CommunityForgotPasswordEmailTemplate</forgotPasswordTemplate>

    <gatherCustomerSentimentData>false</gatherCustomerSentimentData>
    <lockoutTemplate>unfiled$public/CommunityLockoutEmailTemplate</lockoutTemplate>
    <maxFileSizeKb>51200</maxFileSizeKb>
    <networkMemberGroups>
        <permissionSet>MyCommunity_Permissions</permissionSet>
        <profile>Admin</profile>
    </networkMemberGroups>
    <networkPageOverrides>
       <changePasswordPageOverrideSetting>VisualForce</changePasswordPageOverrideSetting>

        <forgotPasswordPageOverrideSetting>Designer</forgotPasswordPageOverrideSetting>
        <homePageOverrideSetting>Designer</homePageOverrideSetting>
        <loginPageOverrideSetting>Designer</loginPageOverrideSetting>
        <selfRegProfilePageOverrideSetting>Designer</selfRegProfilePageOverrideSetting>
    </networkPageOverrides>
    <picassoSite>MyCommunity1</picassoSite>
    <selfRegistration>true</selfRegistration>
    <sendWelcomeEmail>true</sendWelcomeEmail>
    <site>MyCommunity</site>
    <status>Live</status>
    <tabs>
        <defaultTab>home</defaultTab>
        <standardTab>Chatter</standardTab>
    </tabs>
    <urlPathPrefix>mycommunity</urlPathPrefix>
    <welcomeTemplate>unfiled$public/CommunityWelcomeEmailTemplate</welcomeTemplate>
</Network>
```

Sample `package.xml` Manifest File

A manifest file defines the components that you're trying to retrieve. The following sample shows a `package.xml` manifest file for retrieving all the components of an Experience Builder site.

```
<?xml version="1.0" encoding="UTF-8"?>
<Package xmlns="http://soap.sforce.com/2006/04/metadata">
    <types>
        <members>*</members>
        <name>Network</name>
    </types>
    <types>
        <members>*</members>
        <name>CustomSite</name>
    </types>
    <types>
        <members>*</members>
```

```
        <name>ExperienceBundle</name>
    </types>
    <types>
        <members>*</members>
        <name>CustomTab</name>
    </types>
    <types>
        <members>*</members>
        <name>CustomObject</name>
    </types>
    <types>
        <members>*</members>
        <name>ApexClass</name>
    </types>
    <types>
        <members>*</members>
        <name>ApexPage</name>
    </types>
    <types>
        <members>*</members>
        <name>ApexComponent</name>
    </types>
    <types>
        <members>*</members>
        <name>Portal</name>
    </types>
    <types>
        <members>*</members>
        <name>Profile</name>
    </types>
    <types>
        <members>*</members>
        <name>Document</name>
    </types>
    <version>46.0</version>
</Package>
```

SEE ALSO:

Deploy Your Experience Cloud Site with Change Sets

Experience Cloud Authentication and Security

You can help keep your Experience Cloud site more secure by enabling clickjack protection, authenticating users, encrypting data, and protecting against malicious resources and vulnerabilities in components using CSP and Lightning Locker. All these options allow you to maintain the security of your site while still using the external sources you need.

IN THIS SECTION:

Enable Clickjack Protection in Experience Cloud Sites

Clickjacking is a type of attack that tricks users into clicking something, such as a button or link, because they perceive it to be safe. By creating hidden iframes pointing to your Experience Cloud site pages, hackers can entice users to click an element that appears to be on a different web page. But instead of the visible element handling the click, the click is hijacked and some element of the invisible site iframe on top receives it. Clickjacking can potentially lead to data intrusion, unauthorized emails, changed credentials, or other malicious site-specific results. With clickjack protection, however, you can secure your site by controlling whether browsers allow frames pointing to your pages.

You can set clickjack protection to one of the following levels.

- **Allow framing by any page (no protection)**: The least secure level.
- **Allow framing of site or community pages on external domains (good protection)**: Allows framing of your Visualforce site pages by pages on your external domains that are added to the Trusted Domains for Inline Frames list. Framing a Experience Builder site on an external domain isn't supported.
- **Allow framing by the same origin only (recommended)**: The default level for Experience Cloud sites. Allows framing of site pages by pages with the same domain name and protocol security.
- **Don't allow framing by any page (most protection)**: The most secure level, but for Salesforce Tabs + Visualforce sites, it can cause certain pages to appear as blank pages. To avoid this issue, use the default setting instead.

Tip: The location for enabling clickjack protection differs depending on whether your site is an Experience Builder site or a Salesforce Tabs + Visualforce site. If your site has a mixture of both Experience Builder and Visualforce pages, enable clickjack protection in both locations.

Enable Clickjack Protection for Experience Builder Sites

1. In Experience Builder, select **Settings** > **Security & Privacy**.
2. Under Clickjack Protection Level, select a clickjack protection level.

Enable Clickjack Protection for Salesforce Tabs + Visualforce Sites

1. In Experience Workspaces, click **Administration** > **Pages** > **Go to Force.com**.
2. Click **Edit** on the Site Detail page.
3. Select your preferred level of clickjack protection and save your changes.
4. If you chose to allow framing of your site pages on your external domains, click **Add Domain** in the Trusted Domains for Inline Frames section. Then enter the domain that you want to allow iframes on. You can add up to 512 external domains.

Tip: Added domains take effect only when **Allow framing of site pages on external domains** is selected.

Note: Internet Explorer supports clickjack protection through the legacy X-Frame-Options HTTP Header only. This header supports `sameorigin`, `deny` (none), `allowall`, and `allow-from` *`uri`*. In particular, `allow-from` *`uri`* supports only one URI.

To support a list for IE users, the framing site must identify itself to the community domain by passing in a query parameter in the `iframe` tag. For example, if you add `https://example.com` as a trusted external domain, then the page on `https://example.com` must make its iframe as follows:

```
<iframe
src="https://MyDomainName.my.site.com?_iframeDomain=https://example.com"></iframe>
```

You can also set the trusted external domain in the `iframeDomain` cookie. This method allows iframes if the `_iframeDomain` URL variable isn't saved when navigating between pages in IE.

```
Cookie iframeDomainCookie = ApexPages.currentPage().getCookies().get('iframeDomain');

if (iframeDomainCookie == null) {
    iframeDomainCookie = new Cookie('iframeDomain','www.example.com');

    // Set the new cookie for the page
    ApexPages.currentPage().setCookies(new Cookie[]{iframeDomainCookie});
}
```

Authenticate Experience Cloud Site Users

You have several options for authenticating customers and employees in your Experience Cloud site. Customers are users with Community, Customer Portal, External Identity, or partner portal licenses. By default, they can log in with the username and password that Salesforce assigns them for the Experience Cloud site. Your Salesforce org's employees are users with full Salesforce licensing capabilities. These users follow the employee login flow using their Salesforce username and password. Beyond these default settings, you can configure SAML, third-party authentication providers, or OAuth to authenticate and authorize all users accessing your site. You can also configure self-registration to use Login Discovery, which makes it easier for users to authenticate.

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

IN THIS SECTION:

SEE ALSO:

Customize Login, Self-Registration, and Password Management for Your Experience Cloud Site

Configure SAML for Experience Cloud Sites

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

If your Salesforce org already uses SAML single sign-on (SSO) to simplify and standardize your user authentication, you can extend this capability to your Experience Cloud sites.

When implementing SAML SSO for Experience Cloud sites, the key is to use the site URL associated with login for the SSO flow. Also make sure that the site URL in the SAML assertion POST includes `/login`. For more information, see SAML Single Sign-On with Salesforce as the Service Provider.

This table compares requirements for Experience Cloud SAML assertions to requirements for other types of Salesforce domains.

Requirement	Standard	Portal	Salesforce Sites	Experience Cloud Site
URL where SAML assertion POST is made.	login.salesforce.com	login.salesforce.com	login.salesforce.com	*`site 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 (JIT) provisioning to create portal users in the Experience Cloud. These users can be provisioned with `portal_id` excluded.

Requirement	Standard	Portal	Salesforce Sites	Experience Cloud Site
Is `siteUrl` required in assertion?	No	No	Yes–passed as an attribute	No

The following sample SAML assertion shows the site URL specified as the recipient, for a sample customer site in the Acme org. This example applies to an org 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.my.site.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 org has multiple SAML configurations, the previous sample SAML assertion applies. But note these differences in the recipient.

- The trailing slash after `login` isn't required
- The `so` parameter is required and must specify the org ID

The recipient would look like this:

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

When users log out of a site, they're redirected to the `Custom Logout URL` if one is set in the site's SAML settings. To access the SAML settings, from Setup, enter *`Single Sign-On Settings`* in the Quick Find box, then select **Single Sign-On Settings**.

If you're using an org as your identity provider, integrate the service provider as a connected app. For more information, see Integrate Service Providers as Connected Apps with SAML 2.0.

If you set the `Name ID Format` to email address in the connected app definition, SAML messages from your org append the org ID to the user's email address. The following SAML assertion excerpt shows the `Name ID Format` set as email address for a site user.

```
<saml:Subject>
      <saml:NameID
Format="urn:oasis:names:tc:SAML:1.1:nameid-format:emailAddress">00DR00000008fLq@sandy@play-test.com</saml:NameID>

      <saml:SubjectConfirmation Method="urn:oasis:names:tc:SAML:2.0:cm:bearer">
        <saml:SubjectConfirmationData NotOnOrAfter="2021-02-04T20:17:12.647Z"
Recipient="https://playground-test.salesforce.com?so=00DR00000000R6N"/>
      </saml:SubjectConfirmation>
    </saml:Subject>
```

If your service provider accepts only the email address and not the org ID, create a custom attribute for email address in the connected app. For more information, see Add Custom Attributes to a Connected App.

SEE ALSO:

Example SAML Assertions

FAQs for Single Sign-On

Configure Authentication Providers

Employees and customers can access an Experience Cloud site through a third-party authentication provider that supports the OpenID Connect protocol. For example, if you configure Facebook as a third-party authentication provider, your users log in to Facebook through a link on the site login page. Facebook authenticates the user, allowing them access to the site.

Note: The following information assumes that you're familiar with the use of authentication providers for single sign-on. For more information, see Authentication Providers.

Employees and Customers

Customers are users with Community, Customer Portal, External Identity, or partner portal licenses. Your org's employees are users with full Salesforce licensing capabilities.

Your Salesforce developer must update the Apex `createUser(portalId, userData)` registration handler method to account for both employee and customer user creation during third-party authentication to sites. For example, the developer can use a unique attribute in the `userData` object to determine whether the newly created user is an employee or customer. For detailed information, see RegistrationHandler Interface in the *Apex Reference Guide*.

The remaining processes of creating customer users, configuring the service provider website, and defining the authentication provider in your org remain the same.

Visualforce Login Page

If you're using a custom Visualforce login page instead of the default login page, use the `Single Sign-On Initialization URL` as the target URL of a custom login button. You can locate this URL on the Auth. Provider detail page.

For example:
`https://login.salesforce.com/services/auth/sso/orgID/URLsuffix?site=https://acme.my.site.com/support`

Janrain

If you're using Janrain as the authentication provider, pass the following code string to the Janrain login widget deployed on your site.

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

SEE ALSO:

Authentication Providers

Add Request Parameters to an Authentication Provider

Customize Login, Self-Registration, and Password Management for Your Experience Cloud Site

Configure Authorization Flows with OAuth

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

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

The following information assumes that you're familiar with OAuth protocols and authorization flows for connected apps. Experience Cloud supports all available authorization flows, except for the username-password OAuth authorization flow and the SAML assertion flow. When implementing branded OAuth flows for Experience Cloud sites, you configure the authorize URL to use the site URL. The authorization flow then directs users to the app approval page. For more information, see Connected Apps and Authorize Apps with OAuth.

Note: When logged in as another user, an admin or support user can't authorize OAuth data access for the user. For example, if an admin logs in as another user, the admin can't authorize OAuth access for third-party applications to user accounts. This restriction includes single sign-on.

For example, authorize 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 site URL:

```
https://acme.my.site.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 site login page. After they authorize the app, you then set a user access token and a refresh token for future authorization. In requests for the token endpoint, replace the host with the site, like this:

```
https://acme.my.site.com/customers/services/oauth2/token
```

After the connected app receives the `access_token`, it can pass it as a bearer token in the Authorization header request. This example shows a REST API call to Experience Cloud sites:

```
https://site.force.com/customers/services/data/v32.0/ -H
"Authorization: Bearer
00D50000000IehZ\!AQcAQH0dMHZfz972Szmpkb58urFRkgeBGsxL_QJWwYMfAbUeeG7c1E6
LYUfiDUkWe6H34r1AAwOR8B8fLEz6n04NPGRrq0FM"
```

SEE ALSO:

"Step Three: Connect to Connect REST API Using OAuth" in the Connect REST API Developer Guide

Encrypt Experience Cloud Site Data

You can add a measure of security to your Experience Cloud sites by encrypting files, attachments, and supported fields.

Note: Beginning with Spring '17, Shield Platform Encryption no longer masks encrypted data in the presentation layer. This may affect some users' ability to work with encrypted data. If you have data you don't want specific users to see, revisit their field-level security settings, organization-wide sharing defaults, and object permissions.

Keep the following things in mind:

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

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

SEE ALSO:

Which Standard Fields Can I Encrypt?

Strengthen Your Data's Security with Shield Platform Encryption

CSP and Lightning Locker in Experience Builder Sites

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

Experience Builder sites use Content Security Policy (CSP) and Lightning Locker to secure your site from malicious attacks and custom code vulnerabilities. CSP is a W3C standard that controls the source of content that can be loaded on your site's pages and helps protect against cross-site scripting (XSS) attacks. Lightning Locker is a Salesforce architectural layer that allows third-party Lightning components and custom code to run safely on the same page in the browser. With different levels of security, you can optimize your site security choices and tolerance for risk.

Note: By default, sites created before the Spring '19 (February 2019) release use the Allow Inline Scripts and Script Access to Any Third-party Host setting. In Spring '22 (February 2022), that option is being removed for those sites. We strongly recommend updating your script security level and testing your site before that option expires.

For new sites created after the Spring '19 release, Strict CSP is the default CSP setting.

What Is CSP?

CSP is a list of rules that define the Content-Security-Policy HTTP header that's sent to the browser when someone visits your site. Web browsers use these rules to block requests to unknown servers for different kinds of resources such as scripts, images, and other data. Strict CSP makes your site the most secure against these kinds of attacks by preventing requests to other servers, unless explicitly allowed.

CSP determines what is part of your site and what isn't. One of the most important aspects of CSP is how it defines the boundaries of your site. Anything not loaded through your site's domain name, such as a logo hosted on a separate company site, is considered a third-party host. This approach to CSP follows the same-origin policy that browsers already enforce. You can access third-party hosted materials, but you must choose a security level for your site first. Then, allow the hosts as appropriate.

What Is Lightning Locker?

Lightning Locker is a Salesforce architectural layer that enhances the security of the third-party Lightning components in your site and custom code in your `head` markup. These third-party components and custom code can contain security vulnerabilities that enable the exfiltration of data and potentially malicious actions using that data.

Lightning Locker controls whether third-party components and custom code from different namespaces can share data or interfere with each other. If third-party components or custom code deals with sensitive data, communication between these resources is a special concern. For example, without Lightning Locker, a third-party component could include JavaScript that captures secure data that a customer enters in another component, and then send that data to their own servers. Lightning Locker ensures that third-party components and custom code that interacts with resources in other namespace can run safely even when together on the same page in the browser.

Lightning Locker:

- Uses containers to isolate all third-party components that belong to one namespace from third-party components in a different namespace.
- Enforces coding best practices by only allowing access to supported APIs and eliminating access to non-published frameworks.
- Turns on native security features in the browser.

By default, Lightning Locker is turned on for your site. Depending on your security level, you can choose to turn off Lightning Locker for all third-party components and custom code.

Security Levels

You can choose from these security levels.

Security Level	Description
Strict CSP: Block Access to Inline Scripts and All Hosts	Default setting for sites created in Spring '19 (February 2019) and later. Provides maximum security. • Blocks the execution of all inline scripts and all requests for remote JavaScript files.

Security Level	Description
	• Allows the display of non-script resources, such as images, from third-party hosts that are explicitly allowed. • Lightning Locker is turned on.
Relaxed CSP: Permit Access to Inline Scripts and Allowed Hosts	Provides moderate security. • Allows inline scripts to run in your site. • Allows the loading of remote JavaScript files and the display of non-script resources, such as images, from third-party hosts that are explicitly allowed. • Allows you to turn off Lightning Locker.
Allow Inline Scripts and Script Access to Any Third-party Host	Provides no added security, but enables your site to work as currently designed. • Blocks nothing. • Allows access to all third-party hosts without the need to explicitly allow those hosts. • Lightning Locker is turned on and can't be disabled. Note: This option is only visible for sites created before Spring '19. In Spring '22 (February 2022), this option is being removed.

IN THIS SECTION:

CSP and Lightning Locker Design Considerations

Whether you're an administrator, content manager, or developer, be aware of the impact of the different security levels on your Experience Builder site. This impact can be far-ranging and unexpected.

Where to Allowlist Third-Party Hosts for Experience Builder Sites

Regardless of your security level, you must allowlist all non-script resources such as images, style sheets, and fonts that are hosted outside your Experience Builder site. In addition, if you use the Relaxed CSP security level and reference external JavaScript files in your site, you must allowlist these remote hosts.

Select a Security Level in Experience Builder Sites

Choose a security level to control whether scripts can be executed from your Experience Builder site and whether third-party components and custom code can share data.

SEE ALSO:

Experience Cloud Developer Guide: Enable Third-Party Components to Run When Lightning Locker Is Off

Lightning Web Components Dev Guide: Security with Lightning Locker

Lightning Aura Components Developer Guide: Developing Secure Code

Static Resources

CSP and Lightning Locker Design Considerations

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

Whether you're an administrator, content manager, or developer, be aware of the impact of the different security levels on your Experience Builder site. This impact can be far-ranging and unexpected.

Tip: For extra error guidance when developing your Experience Builder site, we recommend using Google Chrome. After you set the CSP security level for your site, test it in other browsers to make sure that your customers have a good experience.

In addition to error messages and feedback, you can use the Developer Console to help identify any directive issues or CSP violations.

What Does the Strict CSP Level Affect?

Strict CSP is the default, maximum security level for Experience Builder sites. This level of security can impact many aspects of your site, especially resources that make calls to external sources, such as:

- Rich Content Editor
- HTML Editor
- Third-party components
- Custom components
- `head` markup
- CMS Connect content

In addition, Strict CSP mitigates the risk of cross-site scripting (XSS) and other content injection attacks by disallowing inline scripts.

Note: We recommend that you update your third-party libraries to modern versions that don't depend on the `unsafe-inline` keyword.

Impact	Description	Example	Recommendation
Blocks inline scripts	All inline scripts, including inline `<script>` elements and inline event handlers, are blocked from running on your site. Common services such as Google Tag Manager can't work properly when these scripts are blocked.	You include an inline script in the `head` markup to write messages to the console log for testing purposes, for example, `<script>console.log('blocked');</script>`. Because all inline scripts are blocked, messages aren't written to the log.	Replace inline scripts in your site and instead use a static resource that's uploaded as a relative URL, or avoid inline scripts entirely.
Blocks remote JavaScript resources	All requests for remote JavaScript files are blocked from executing.	You want to use the popular D3.js library to create a scatterplot. But because all remote JavaScript files are blocked, nothing is drawn.	Upload all JavaScript libraries to your org as static resources, and then add the static resource to your component. After the library is loaded from the static resource, you can use it as normal..
Blocks non-script remote resources unless allowlisted	All requests for non-script resources to external servers are prevented, unless you explicitly allow those servers.	You decide to host your company logo on an external server and reference it in a component. However, the image isn't shown.	Host your resources through Salesforce using component functionality, such as the Rich Content Editor. Or you can host the

Impact	Description	Example	Recommendation
			asset as a static resource and refer to it with a relative URL.
Isolates third-party components and custom code because Lightning Locker is always on	Prevents third-party components and custom code from different namespaces from interacting and accessing each other's DOM. These resources can only access supported APIs. If you inadvertently allow a malicious domain, isolated resources are unable to send any data other than their own to that domain.	You have a third-party component that uses a login form to read a password and send it to a service for validation. Other third-party components on the same page are prevented from reading the password and potentially doing something malicious with it.	Follow best practices for using third-party components in your site and custom code in your `head` markup. If you have trouble getting third-party components or custom code to work with Lightning Locker, see Resolve Lightning Locker Conflicts in Experience Builder in the *Experience Cloud Developer Guide*.

What Does the Relaxed CSP Level Affect?

To use resources from third parties such as Google, you can choose the Relaxed CSP level. But make sure that you understand the ramifications of a less secure, relaxed CSP environment on your site.

In this state, you can optionally disable Lightning Locker when custom functionality doesn't work properly. But we strongly advise against turning off Lightning Locker. For information on Lightning Locker workarounds, see Resolve Lightning Locker Conflicts in Experience Builder in the *Experience Cloud Developer Guide*.

Impact	Description	Example
Allows inline scripts	All inline scripts are allowed to run in your site, including scripts that use `eval()`. These scripts are allowed because many common services such as Google Tag Manager require them to work properly. Warning: Inline scripts are a common source of XSS attacks.	You include in your `head` markup an inline script to log every user action on a page for marketing-related analysis. Because inline scripts are allowed, analytics are logged successfully.
Allows remote JavaScript and non-script resources when allowlisted	All requests to external servers for JavaScript files and non-script resources are allowed when you identify the servers. Client-side code can also make requests to your site.	You use a script that pulls in your company's blog posts. For the content to show, allow the script for the site using the Trusted Sites for Scripts area in Experience Builder, and allow the non-script content host in CSP Trusted Sites in Setup.
Isolates third-party components and custom code when Lightning Locker is on	Third-party components and custom code from different namespaces are prevented from interacting and accessing each other's DOM. These resources can only access supported APIs. If you inadvertently allow a malicious domain, isolated resources are unable to send data to that domain.	By mistake, you use a malicious component on the same page that you're exposing internal Salesforce records through a Salesforce out-of-the-box component. Because the components are isolated, the malicious component is unable to access those records.

Impact	Description	Example
Allows third-party components and custom code to communicate when Lightning Locker is off	Third-party components and custom code from different namespaces can interact and access each other's DOM. These resources can also use unpublished frameworks. And resources in an open browser tab are exposed, permitting third-party components and custom code to access and edit them. Partners and developers of managed packages on AppExchange must choose whether they want their components to be available when Lightning Locker is turned off in the relaxed CSP environment.	You want to use third-party components that automatically inject additional third-party JavaScript into the page, including the site's `head` markup.

SEE ALSO:

Experience Cloud Developer Guide: Using the Developer Console

Lightning Web Components Dev Guide: Determine Whether a JavaScript Library Is Locker Compliant

Lightning Aura Components Developer Guide: eval() Function is Limited by Lightning Locker

Lightning Web Components Dev Guide: Use Third-Party JavaScript Libraries

Lightning Aura Components Developer Guide: Using External JavaScript Libraries

Experience Cloud Developer Guide: Enable Third-Party Components to Run When Lightning Locker Is Off

Where to Allowlist Third-Party Hosts for Experience Builder Sites

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

Regardless of your security level, you must allowlist all non-script resources such as images, style sheets, and fonts that are hosted outside your Experience Builder site. In addition, if you use the Relaxed CSP security level and reference external JavaScript files in your site, you must allowlist these remote hosts.

You allowlist hosts differently depending on the resource type. Non-script resources from external hosts, such as a logo or style sheet stored on a corporate site, can be shared with Lightning Experience across your entire org and are allowlisted in Setup. Script resources from external hosts such as JavaScript are instead specific to each site and are allowlisted in Experience Builder. Be careful to allow only external sites that you trust.

We automatically allow the following sites:

- All Salesforce-hosted data and files when referenced in your site.
- Google Analytics required sites when you add your tracking ID to the Google Analytics setting in Experience Builder. These addresses include `https://www.google-analytics.com`, `https://stats.g.doubleclick.net`, and `https//www.googletagmanager.com/gtag/js`.
- Addresses that can be referenced by image tags in Chatter feed comments with video and the Rich Content Editor's video insertion functionality. These addresses include `https://img.youtube.com`, `https://i.ytimg.com`, and `https://i.vimeocdn.com`, and addresses that can be referenced by frame tags, such as `https://img.youtube.com`, `https://player.vimeo.com`, and `https://play.vidyard.com`.

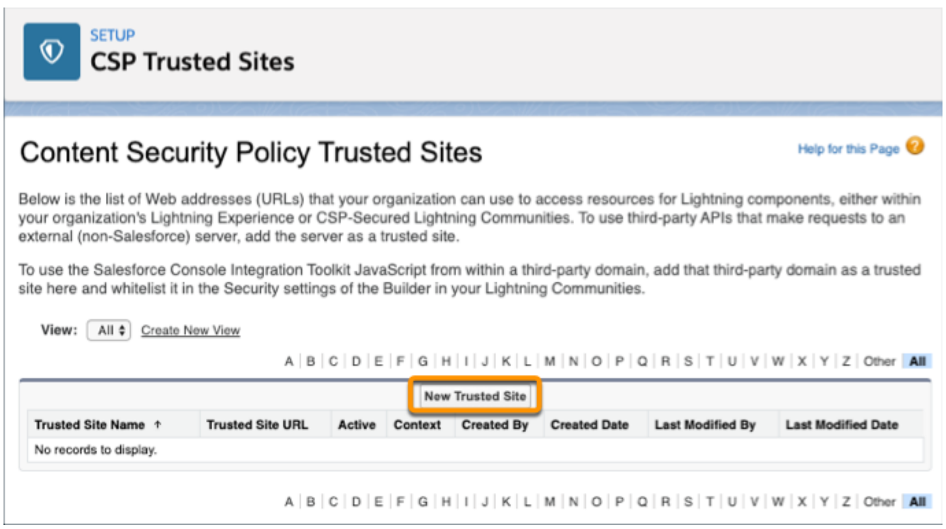
Tip: Remember to also allowlist any scripts or images used by external hosts that you already allowed so that those resources are displayed.

Where Do I Allow Hosts of Non-Script Resources?

Non-script resources hosted outside your site use a `src` attribute defined by `https://any.otherdomain.com` or `wss://any.otherdomain.com`. Common non-script resources include:

- Images
- Style sheets
- Fonts
- Media (audio and video)
- URLs using script interfaces
- Resources contained in frame elements
- Third-party APIs
- WebSocket connection

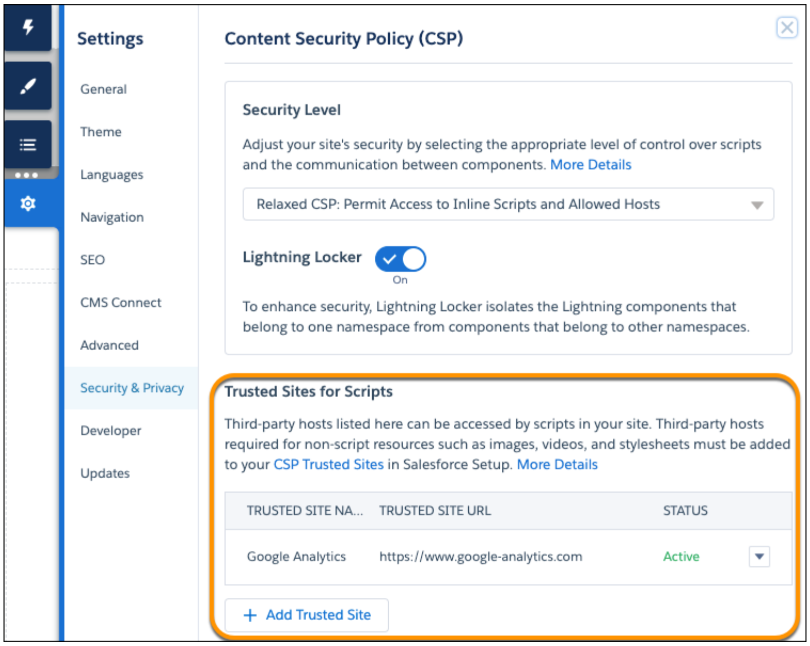
For these non-script resources, you allow hosts in CSP Trusted Sites in Setup. The resources are then available for all Experience Builder sites in your org. See Create CSP Trusted Sites to Access Third-Party APIs.



Where Do I Allow Hosts of Script Resources?

For remote script resources, such as JavaScript, you allowlist hosts in Experience Builder in **Settings** > **Security & Privacy**.

After you select the **Relaxed CSP** security level, you can add hosts in the Trusted Sites for Scripts area that appears. To use remote resources in your other Experience Builder sites, you must allowlist each resource separately per site.



From the Trusted Sites for Scripts section, you can edit or delete a site in the allowlist. You can also activate or deactivate trusted sites, which makes it easy to test or maintain your site without deleting sites from the site configuration. And if you change to Strict CSP, these allowed sites remain, which permits you to switch security levels easily.

SEE ALSO:

Enable Google Analytics™ for Your Experience Cloud Site

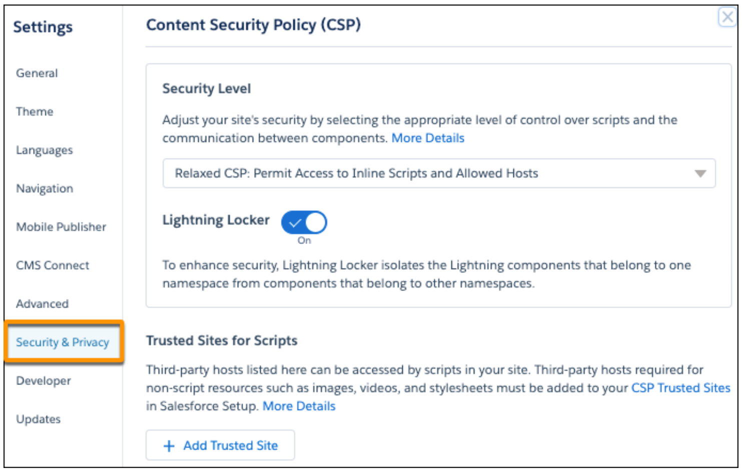
Track Site Users with Your Google Analytics Tracking ID

Select a Security Level in Experience Builder Sites

Choose a security level to control whether scripts can be executed from your Experience Builder site and whether third-party components and custom code can share data.

Selecting a security level depends on your needs and tolerance for risk. We recommend running Strict CSP for optimum security. You can easily switch between levels to test how different security levels affect your customers' experience.

1. In Experience Builder, open **Settings** > **Security & Privacy**.



2. Select a security level.

Security Level	Description
Strict CSP: Block Access to Inline Scripts and All Hosts	Default setting for sites created in Spring '19 (February 2019) and later. Provides maximum security. • Blocks the execution of all inline scripts and all requests for remote JavaScript files. • Allows the display of non-script resources, such as images, from third-party hosts that are explicitly allowed. • Lightning Locker is turned on.
Relaxed CSP: Permit Access to Inline Scripts and Allowed Hosts	Provides moderate security. • Allows inline scripts to run in your site. • Allows the loading of remote JavaScript files and the display of non-script resources, such as images, from third-party hosts that are explicitly allowed. • Allows you to turn off Lightning Locker.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

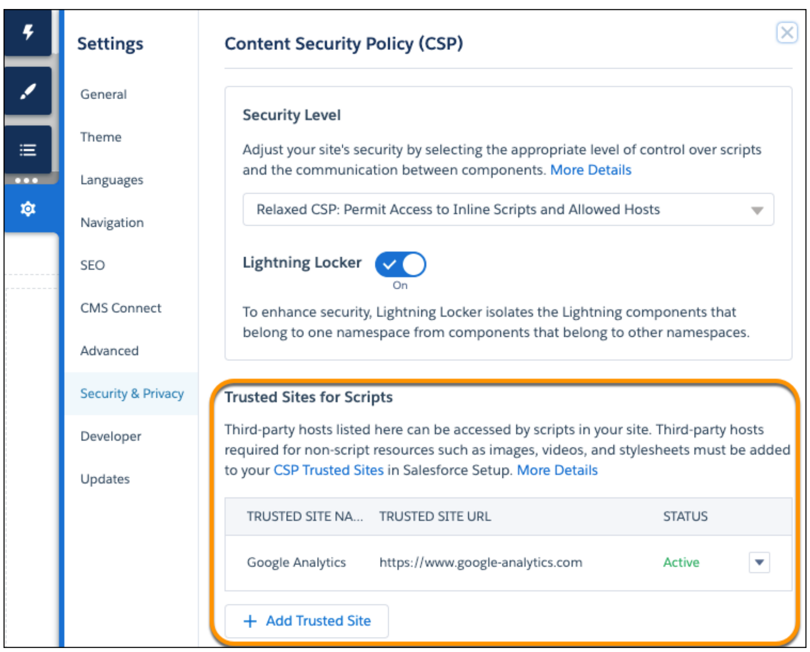
- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

Security Level	Description
Allow Inline Scripts and Script Access to Any Third-party Host	Provides no added security, but enables your site to work as currently designed. • Blocks nothing. • Allows access to all third-party hosts without the need to explicitly allow those hosts. • Lightning Locker is turned on and can't be disabled. Note: This option is only visible for sites created before Spring '19. In Spring '22 (February 2022), this option is being removed.

3. If you use non-script resources hosted outside Salesforce, such as images or style sheets, add the hosts to CSP Trusted Sites in Setup. See Create CSP Trusted Sites to Access Third-Party APIs.
   Hosts allowed in CSP Trusted Sites are available to Lightning Experience, Experience Builder sites, or both, depending on the context you apply. If available to Experience Builder sites, that host is allowed for all sites in your Salesforce org.
4. If you use script resources hosted outside Salesforce, select **Relaxed CSP**, and allow the third-party hosts in the Trusted Sites for Scripts area that appears.



a. Click **Add Trusted Site**.

b. Enter a friendly name and the resource URL.

   For added security, include the entire URL path to the resource folder—for example, `https://www.example.com/logos/`. Use the syntax `https://site_url/resource_folder/`, and ensure that the URL ends in `/`. If you add the URL for the whole domain rather than a specific resource folder, you extend trust to all resources on that domain, which can introduce a security vulnerability.

c. Click **Add Site**.

Note:

- Allowed external sites are specific to each Experience Builder site.
- You can activate or deactivate a trusted site for easy testing and maintenance, without having to remove it from your site configuration.

5. Optionally, if you selected **Relaxed CSP**, you can turn off Lightning Locker.

   For example, sometimes it's necessary to turn off Lightning Locker to use custom components that automatically inject additional third-party JavaScript into the page, including the site's `head` markup.

   Warning: Turning off Lightning Locker can potentially cause security flaws in your site. If a third-party component isn't enabled to work without Lightning Locker, the component can prevent the component from being available at design time and rendering at runtime. See Enable Third-Party Components to Run When Lightning Locker Is Off and Resolve Lightning Locker Conflicts in Experience Builder in the *Experience Cloud Developer Guide*.

6. Publish your site.

Experience Cloud Cookies

EDITIONS

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

Experience Cloud uses cookies to improve functionality and accelerate processing times. By saving a user's settings, cookies can enhance the user's experience and the performance of the Experience Cloud site.

Salesforce doesn't currently provide functionality for end-user cookie consent management in Experience Builder sites. The platform is compatible with many existing third-party solutions. We recommend that you work with you internal IT teams or consult your implementation partners to identify the right solution for your organization's needs.

Experience Cloud collects two different types of cookies:

- **Required:** Strictly necessary for the website to work correctly.
- **Functional:** Used for analytics and performance.

Note: While Experience Cloud can run without the use of functional cookies, site functionality can be reduced, depending on the cookie's purpose.

Experience Cloud Cookies are limited to Lightning-based sites.

The following table describes the Experience Cloud cookies collected by Salesforce.

Table 2: Cookies for All Users (Authenticated and Unauthenticated)

Cookie Name	Duration	Cookie Type	Description
`_ga`	Long	Functional	A third-party cookie that's used if the site admin chooses to track site users with a Google Analytics tracking ID.
`{UserId}_KMPage`	1 day	Functional	In Salesforce Classic, used to read the last user selection for 'Find in View', 'Article Language', {DataCategory}, and 'Validation Status' in Article Management.

Cookie Name	Duration	Cookie Type	Description
{UserId}_KnowledgePageDispatcher	Session	Functional	In Salesforce Classic, used to remember the user selection to determine whether to show 'Articles' or 'My Drafts' view in Knowledge.
{UserId}_KnowledgePageFilter{DataCategory}	Session	Functional	In Salesforce Classic, used to remember the last user selection for data category filter in Knowledge.
{UserId}_KnowledgePageFilterArticleArticleType	Session	Functional	In Salesforce Classic, used to remember the last user selection for article type filter for 'Articles' view in Knowledge.
{UserId}_KnowledgePageFilterArticlePublishStatus	Session	Functional	In Salesforce Classic, used to remember the last user selection for publish status filter for 'Articles' view in Knowledge.
{UserId}_KnowledgePageFilterArticleValidationStatus	Session	Functional	In Salesforce Classic, used to remember the last user selection for validation status filter for 'Articles' view in Knowledge.
{UserId}_KnowledgePageFilterLanguage	Session	Functional	In Salesforce Classic, used to remember the last user selection for language filter in Knowledge.
{UserId}_KnowledgePageFilterMyDraftArticleType	Session	Functional	In Salesforce Classic, used to remember the last user selection for article type filter for 'My Drafts' view in Knowledge.
{UserId}_KnowledgePageFilterMyDraftPublishStatus	Session	Functional	In Salesforce Classic, used to remember the last user selection for publish status filter for 'My Drafts' view in Knowledge.
{UserId}_KnowledgePageFilterMyDraftValidationStatus	Session	Functional	In Salesforce Classic, used to remember the last user selection for validation status filter for 'My Drafts' view in Knowledge.
{UserId}_KnowledgePageSortFieldArticle	Session	Functional	In Salesforce Classic, used to remember the last user selection for 'Sort by' for 'Articles' view in Knowledge.
{UserId}_KnowledgePageSortFieldMyDraft	Session	Functional	In Salesforce Classic, used to remember the last user selection for

Cookie Name	Duration	Cookie Type	Description
			'Sort by' for 'My Drafts' view in Knowledge.
{UserId}_spring_KnMlAnyoneDraftArticlesList	1 Day	Required	In Salesforce Classic, used to configure layout properties for Draft Articles view in Article Management.
{UserId}_spring_KnMlArchivedArticlesList	1 Day	Required	In Salesforce Classic, used to configure layout properties for 'Archived Articles' in Article Management.
{UserId}_spring_KnMlMyDraftArticlesList	1 Day	Required	In Salesforce Classic, used to configure layout properties for 'Draft Articles' assigned to 'Me' in Article Management.
{UserId}_spring_KnMlMyDraftTranslationsList	1 Day	Required	In Salesforce Classic, used to configure layout properties for 'Draft Translations' in Article Management.
{UserId}_spring_KnMlPublishedArticlesList	1 Day	Required	In Salesforce Classic, used to configure layout properties for 'Published Articles' in Article Management.
{UserId}_spring_KnMlPublishedTranslationsList	1 Day	Required	In Salesforce Classic, used to configure layout properties for 'Published Translations' in Article Management.
`<namespace>_sid`	Session	Required	Identify Live Agent session. Stores a unique pseudonymous ID for a specific browser session over chat service.
`activeView`	Session	Functional	In Salesforce Classic, used to remember the last user selection for 'Articles' or 'Translations' tab in Article Management.
`alohaEpt`	90 Seconds	Functional	Used to calculate the `ExperiencePageTime` on Salesforce Classic pages.
`apex__EmailAddress`	1 Year	Required	Caches contact IDs associated with email addresses.
`auraBrokenDefGraph`	1 Week	Functional	Used to track when the Lightning page has malformed HTML.

Cookie Name	Duration	Cookie Type	Description
autocomplete	60 Days	Functional	Determines if the login page remembers the user's username.
BAYEAX_BROWSER	Expired on Creation	Required	Identify a unique browser subscribed to CometD streaming channels.
BrowserId	1 Year	Required	Used for security protections.
BrowserId_sec	1 Year	Required	Used for security protections.
caPanelState	Session	Functional	Saves the open, closed, and height percent states of the calendar panel.
calViewState	Session	Functional	Sets the inline calendar date state in Salesforce Classic (current week selected).
clientSrc	Session	Required	Used for security protections.
communityId	Session	Required	Cookie set to tie the ideas to a specific Experience Cloud site.
CookieConsent	1 Year	Required	Used to apply end-user cookie consent preferences.
CookieConsentPolicy	1 Year	Required	Used to apply end-user cookie consent preferences set by our client-side utility.
cookieSettingVerified	Session	Required	Used to create popup message telling users cookies are required.
cordovaVersion	Session	Required	Used for internal diagnostics with mobile applications.
cqcid	1 Year	Functional	Used to track guest shopper's browsing activity.
csssid	Session	Required	Used to establish a request context in the correct tenant org.
csssid_Client	Session	Required	Enables user switching.
devOverrideCsrfToken	Session	Required	CSRF Token.
directMessageInboxVisitTimestamp	Long	Functional	Used by Direct Message to determine the last visit to the inbox.
disco	Session	Required	Tracks the last user login and active session for bypassing login (ex: OAuth immediate flow).
<userId>expid_[site prefix]	30 Days	Functional	Used to render pages based on specified brand.

Cookie Name	Duration	Cookie Type	Description
`<userId>feeds`	Long	Functional	Used to store a user's feed settings selection.
`force-proxy-stream`	3 hours	Required	Ensure client requests hit the same proxy hosts and are more likely to retrieve content from cache.
`force-stream`	Long	Required	Used to redirect server requests for sticky sessions.
`FedAuth`	Session	Required	For the SharePoint connector, used to authenticate to the top-level site in SharePoint.
`gTalkCollapsed`	1 Year	Required	Controls if the sidebar in Salesforce Classic is open or not for a user.
`hideDevelopmentTools`	Session	Functional	Used to determine whether to show the developer tools.
`hideFilesWarningModal`	50 Years	Functional	Stores user acknowledgment that a public link to a Salesforce file is on email send. The warning window isn't continually shown after the user acknowledges this action.
`hideIdentityDialog`	1 Year	Functional	Hides the dialog box that informs that the current user is out when switching to another user.
`idccsrf`	3 Months	Required	Tracks `CrossSiteRequestForgery` validation for certain SSO flows.
`ideaToggle`	Session	Functional	Show 'Ideas' list view or 'Feed' list view.
`inst`	Session	Required	Used to redirect requests to an instance when bookmarks and hardcoded URLs send requests to a different instance. This type of redirect can happen after an org migration, a split, or after any URL update.
`iotcontextsplashdisable`	10 Years	Functional	For the IoT product, stores user preference of whether to show Context Splash popup.
`lastlist`	Session	Required	Used to store the cookie name for the last list URL.

Cookie Name	Duration	Cookie Type	Description
liveagent_invite_rejected_	Session	Functional	Don't reissue an invitation on the same domain. Deletion of this cookie degrades customer experience as they can get repeated invitations.
liveagent_sid	Session	Required	Identify Live Agent session. Stores a unique pseudonymous ID for a specific browser session over chat service.
lloopch_loid	1 Year	Required	Determine whether to send the user to a specific portal login or an app login.
login	60 Days	Functional	Used to fetch the username and populate it on the main login page when using the process builder app if the user's session has expired.
logouturl	Session	Functional	Stores the last logged in org for redirecting requests. Used for logging whether the cookie is present in site and community guest-user requests.
oid	2 Years	Required	Stores the last logged in org for redirecting requests. Used for logging whether the cookie is present in site and community guest-user requests.
oinfo	3 Months	Functional	Tracks the last logged in org.
pc-unit	1 Year	Functional	Sets preference for displaying platform cache units to either MB or KB.
pctrk	Session	Required	Used to track unique page visitors in Experiences.
PicassoLanguage	Session	Required	Used to store a user’s language selection for this Experience Builder site. The site doesn’t load without this cookie if the user changes the site’s language.
promptTestMod	30 Days	Required	Stores whether test mode is in effect. This cookie read-only.
redirectionWarning	1 Year	Functional	Enable customer to store URLs that are exempt from setting a redirect warning interstitial page on an allowlist.

Cookie Name	Duration	Cookie Type	Description
renderCtx	Session	Required	Used to store site parameters in the session for reuse across requests by a single client for functionality and performance reasons.
RRetURL	Session	Required	Used with 'Log in As' to restore the original state.
RRetURL2	Session	Required	The return URL to redirect to when logging out of a session.
RSID	Session	Required	Session ID and login-as session ID. In this case the cookies are copied to the response and in a proxy situation cause the target URL to rebuild appropriately. The cookies aren't created, examined, or modified.
schgtclose	0	Functional	Deprecated feature, not used.
sfdc-stream	3 hours	Required	Used to properly route server requests within Salesforce infrastructure for sticky sessions.
showNewBuilderWarningMessage	100 years	Functional	Used to show or hide a warning message for the new dashboard builder.
sid	Session	Required	SessionID.
sid_Client	Session	Required	Used to detect and prevent session tampering.
sidebarPinned	10 Years	Required	Controls the state of the Salesforce Classic sidebar.
ssostartpage	1 Year	Required	Identifies the IdP location for SSO; certain service provider initiated SSO requests can fail without this cookie.
SUCSP	Session	Required	Used when the user identity that an administrator is assuming (via Log in to Experience as User) is a Customer Success Portal (CSP) user.
SUPRM	Session	Required	Used when the user identity that an administrator is assuming (via Log in to Experience as) is a Partner Relationship Management (PRM) portal user.
t	Expired on Creation	Functional	Used to avoid duplicate access checks.

Cookie Name	Duration	Cookie Type	Description
useStandbyUrl	Not Set	Required	Controls how quickly to set the standby URL when loading the softphone.
waveUserPrefFinderListView	100 Years	Functional	Preference for displaying list views in Tableau CRM.
waveUserPrefFinderLeftNav	100 Years	Functional	Preference for left navigation UI in Tableau CRM.
webact	Long	Functional	Used to collect metrics per page view for personalization.
WelcomePanel	1 Day	Functional	Stores Experience Cloud preferences.
52609e00b7ee307e	Session	Required	Browser Fingerprint cookie. Used to detect session security problems.
79eb100099b9a8bf	Session	Required	Browser Fingerprint trigger cookie. Used to detect session security problems.

Securely Share Your Experience Cloud Sites with Guest Users

Experience Cloud sites help you connect with customers and partners. When building your site, you can use various settings and permissions to protect your data and your customers' data, and publicly share the site with guest users. Keeping your data secure is a joint effort between you and Salesforce.

Get a printable version of the security guide here.

EDITIONS

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** editions

IN THIS SECTION:

Guest User Security Policies and Timelines

To improve data security for orgs with guest users, Salesforce made some security improvements. Use this topic as a starting point to understand all the security improvements and updates, including timelines for enforcement and how to prepare for the changes.

Give Secure Access to Unauthenticated Users with the Guest User Profile

Use a guest user profile to control public access to data, content, and objects in your site that don't require authentication. For example, you can create a customer support community where existing and potential customers can view public discussions, known issues, and solutions posted by other members or support without logging in.

Assign Records Created by Guest Users to a Default User in the Org

To increase the security of your Salesforce data, guest users are no longer automatically the owner of records they create. Instead, when a guest user creates a record, the record is assigned to a default active user in the org, who becomes the owner.

Secure Data Accessible by Guest Users

Protect your data by securing the data created by unauthenticated guest users prior to Salesforce's enforcement of the guest user security policies in the Winter '21 and Spring '21 releases.

SEO Best Practices and Considerations for Guest Users

To configure your site for search engine optimization (SEO), Salesforce uses the guest user profile to identify the public pages and objects available for indexing. A search engine is considered a guest, or unauthenticated, user. ForExperience Builder sites, Salesforce automatically generates a sitemap with a list of the publicly accessible content. For sites built with Salesforce Tabs +Visualforce, you are responsible for creating the sitemap and indicating which pages are included.

Control Public Access to Your Experience Builder Sites

Set the public access level to your Experience Builder site, and set page-specific access to your site pages.

Object-Specific Security Best Practices for Guest Users

After you configure the guest user profile and the site guest user record, keep object-specific best practices in mind for guest user access.

Test Guest User Access in Your Experience Cloud Site

After you've implemented the recommended security settings, take your Experience Cloud site on a test drive to see what guest users see.

Control Which Users Experience Cloud Site Users Can See

User sharing lets you decide whether all users in an Experience Cloud site are visible to each other.

Guest User Security Policies and Timelines

To improve data security for orgs with guest users, Salesforce made some security improvements. Use this topic as a starting point to understand all the security improvements and updates, including timelines for enforcement and how to prepare for the changes.

EDITIONS

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

The Salesforce security policy encompasses all public sites created in a Salesforce org, including Lightning Platform, Site.com, or Experience Cloud. When this policy is fully enforced, any public-facing site must follow these rules.

- Securing access to records by guest users
  - Guest user external org-wide defaults are always set to private.
  - Guest users can't have more than read access to data.
  - Guest users can't be members of public groups or queues.
    - Guest users that were added to public groups or queues before this policy was enabled aren't removed automatically. You must remove these guest users manually.
  - Guest users can't access records via manual sharing.
  - Guest users can only get access to records through guest user sharing rules, a special type of criteria-based sharing rule.
    - The maximum access granted to guest users via sharing rules is read.
  - Guest users can't have the update or delete permissions on objects. Guest users can only update or delete records in System Mode.
  - Guest users can't have View All or Modify All access on objects.
- Assigning new records created by guest users to a default owner in your org
  - Guest users can't be the owner for newly created records.
  - Guest users can't be given ownership of existing records.
  - Ownership of records created by guest users must be transferred to a default owner, who is an active user in your org.
- Viewing other members of a publicly available site

- Guest users can’t be assigned the View All Users permission.
- Your org can assess member visibility on a site by site basis.

Timelines for Enforcing Public Site Security Policies

Settings have been enabled every release since Summer ’20. Check to see what release your org is running on Salesforce Status.

Details of the Winter ’22 Updates

Salesforce added the setting **Enforce secure record access for guests accessing products** to use in testing guest user sharing rules for the Product2 object during Winter ’22. Turn the setting on or off in **Setup** > **Product**.

The setting will be removed with the Spring ’22 release. The **Secure guest user record access** setting will also be applied to products in Spring ’22. For guest users, org-wide defaults are set to Private for the Product2 object, and this access level can't be changed. To grant guest users access to product records, you must create guest user sharing rules.

Details of the Winter ’21 Updates

In the Winter ’21 release, Salesforce enabled the following three settings. These settings can't be disabled.

- Setting name: **Secure guest user record access**
  - To access this setting, from Setup enter `Sharing Settings` in the Quick Find box.
  - Select **Sharing Settings**.
- Setting name: **Assign new records created by guest users to the default owner**
  - To access this setting, from Setup enter `Digital Experiences` in the Quick Find box.
  - Select **Digital Experiences** > **Settings**.
- Setting name: **Assign new records created by the Salesforce Sites guest users to a default owner in the org**
  - To access this setting, from Setup enter `Sites` in the Quick Find box.
  - Select **Sites and Domains** > **Sites**.

Details of the Spring ’21 Updates

The following guest user object permissions are removed with the Spring ’21 release.

- Edit
- Delete
- Modify All
- View All

The preceding permissions are turned off for custom objects and the following standard objects: Order, Survey Response, ProfileSkillUser, and ProfileSkillEndorsement.

Important: With the Spring ’21 release, Salesforce is removing the View All, Modify All, edit, and delete permissions for guest users in all orgs.

If a permission set or permission set group is assigned to the guest user and grants Modify All, View All, edit, or delete, to custom objects, or Order, Contract, Survey Response, ProfileSkillUser, and ProfileSkillEndorsement, then the guest user is removed from the permission set or permission set group. If any other permissions were granted using the same permission set or permission set group, the guest user can't access them. If you have permission sets or permissions set groups that have Modify All, View All, edit, or delete permissions on objects, and other permissions, we recommend that you clone the permissions sets and remove Modify All, View All, edit, or delete permissions. You can then reassign the cloned permission sets and permission set groups to guest users. With the Spring '21 release, you can no longer assign Modify All, View All, edit, or delete permissions to guest users, even with a permission set or permission set group.

These obsolete permissions, with no app logic tied to them, were also removed from guest user profiles:

- Enable UI Tier Architecture
- Remove People from Direct Messages
- View Topics
- Send Non-Commercial Email
- Share internal Knowledge articles externally
- Hide the Seen By List
- Enable RecordVisibility API
- Assign Topics
- Verify Answers to Chatter Questions
- Close Conversation Threads
- Edit Topics
- Create Topics
- Delete Topics
- Merge Topics
- Allow user to access privacy data
- Modify Data Classification
- Use Any API Client
- Can Approve Feed Post and Comment

Moreover, the following changes were enforced:

- The View All Users permission was disabled for all guest users with the Summer '20 release. Use the site-specific Let guest users see other members of this site setting instead. The permission is removed from all guest users permanently with the Winter '21 release.

Potential Impact to Your Org with the Spring '21 Release

The enforcements of the public site security policies affect all customer orgs with Salesforce public sites built on Lightning Platform, Site.com, Lightning Platform, or Experience Cloud.

With the enforcement of the new security policy, your guest users' access to your public sites may change. Potential impact includes the following scenarios:

- Guest users may lose access to data.
- Guest users can no longer update or delete records.
- Guest users can no longer complete forms using Flows.
- Guest users may lose visibility to other users of the public site.
- Guest users can no longer upload files.
- The `apex:inputField` and other similar standard markup components, may no longer render for guest users on custom Visualforce pages or Lightning components.

- The `lightning:outputField` doesn't render correctly for guest users if they no longer have edit permissions.

Give Secure Access to Unauthenticated Users with the Guest User Profile

EDITIONS

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

USER PERMISSIONS

To enable public access to content on a public site:

- Create and Set Up Experiences

  AND

  Is a member of the site

Use a guest user profile to control public access to data, content, and objects in your site that don't require authentication. For example, you can create a customer support community where existing and potential customers can view public discussions, known issues, and solutions posted by other members or support without logging in.

When you create an Experience Cloud site, Salesforce creates a profile, a user record, and sharing mechanisms that are available only to guest users, regardless of whether the site is configured for public access. Each public community, portal, or site uses this guest user profile and record to let unauthenticated users browse the site. All guest visitors to a public site share the same guest user record (one per site) and have the same access level.

For instance, let's say you have three communities or portals set up in your Salesforce org. Each community or portal has its own guest user profile and guest user record.

Here's how it works.

- Community—> Guest User Profile 1 —> Community Site Guest User
- Portal—> Guest User Profile 2 —> Portal Site Guest User
- Site—> Guest User Profile 3 —> Site Guest User

A guest user has access to certain pages in your community, portal, or site as long as the site is active in your org. For example, guest users can always see login and login error pages in your site.

Sharing data with guest users should be a careful and considerate process. Salesforce defaults are the most restrictive they can be for guest users, and it's up to you to decide to share data with guests or not. To secure your site for guest users, consider all the use cases and implications and implement security controls that you think are appropriate for the sensitivity of your data.

IN THIS SECTION:

Secure Guest Users' Sharing Settings and Record Access
Secure the access that unauthenticated guest users have to your org's data.

Configure the Guest User Profile
Before publishing your Experience Cloud site with public access enabled, configure the guest user profile so that your customers can view and interact with your site without logging in.

Configure the Site Guest User Record
Each time an Experience Cloud site is created, Salesforce creates a guest user profile and a site guest user record. The site guest user record is the only user record associated with the guest user profile.

SEE ALSO:

Enable Optional Experience Cloud Site Features
Apex Developer Guide: Methods Available to Experience Cloud Guest Users

Secure Guest Users' Sharing Settings and Record Access

Secure the access that unauthenticated guest users have to your org's data.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** editions

USER PERMISSIONS

To edit guest user sharing settings:

- Manage Sharing

Important: The Secure guest user record access setting is enabled in all Salesforce orgs with Experience Cloud sites and can't be disabled. The timelines for the rollout and enforcement of this setting are published in Guest User Security Policies and Timelines.

1. From Setup, enter `Sharing Settings` in the Quick Find box.
2. Select **Sharing Settings**.
3. Select **Secure guest user record access**.
   When this setting is enabled, guest users:
   - Have org-wide defaults set to Private for all objects, including objects not listed on the Sharing Settings page but excluding the Product2 object. This access level can't be changed. Child objects with a master-detail relationship that rely on a parent's sharing settings have an org-wide default of Controlled by Parent. The parent object's Private org-wide default is inherited by the child object, making it Private too.

     Note: To secure guest user access on the Product2 object, select the **Enforce secure record access for guests accessing products** setting in **Setup** > **Product**.

   - Can't be added to queues or public groups.
     - Guest users that were added to queues or public groups before this setting was enabled aren't removed automatically. You must remove these guest users manually.
   - Can't be given access to records through manual sharing or Apex managed sharing.
   - Can be granted Read Only access to records only through guest user sharing rules. Guest user sharing rules are a special type of criteria-based sharing rule and count toward the limit of 50 criteria-based sharing rules per object.

     Warning: The guest user sharing rule type grants access to guest users without login credentials. By creating a guest user sharing rule, you're allowing immediate and unlimited access to all records matching the sharing rule's criteria to anyone. To secure your Salesforce data and give your guest users access to what they need, consider all the use cases and implications of creating this type of sharing rule. Implement security controls that you think are appropriate for the sensitivity of your data. Salesforce is not responsible for any exposure of your data to unauthenticated users based on this change from default settings.

SEE ALSO:

Create Guest User Sharing Rules

Configure the Guest User Profile

Before publishing your Experience Cloud site with public access enabled, configure the guest user profile so that your customers can view and interact with your site without logging in.

For Experience Builder sites, access the guest user profile from Experience Builder.

1. In Salesforce Setup, enter `digital experiences` in the Quick Find box and select **All Sites**.
2. Next to the site that you want to access, click **Builder**.
3. In Experience Builder, click ⚙ and select **General**.
4. Under Guest User Profile, click the profile name.

EDITIONS

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

USER PERMISSIONS

To access Experience Workspaces:
- Create and Set Up Experiences

  AND

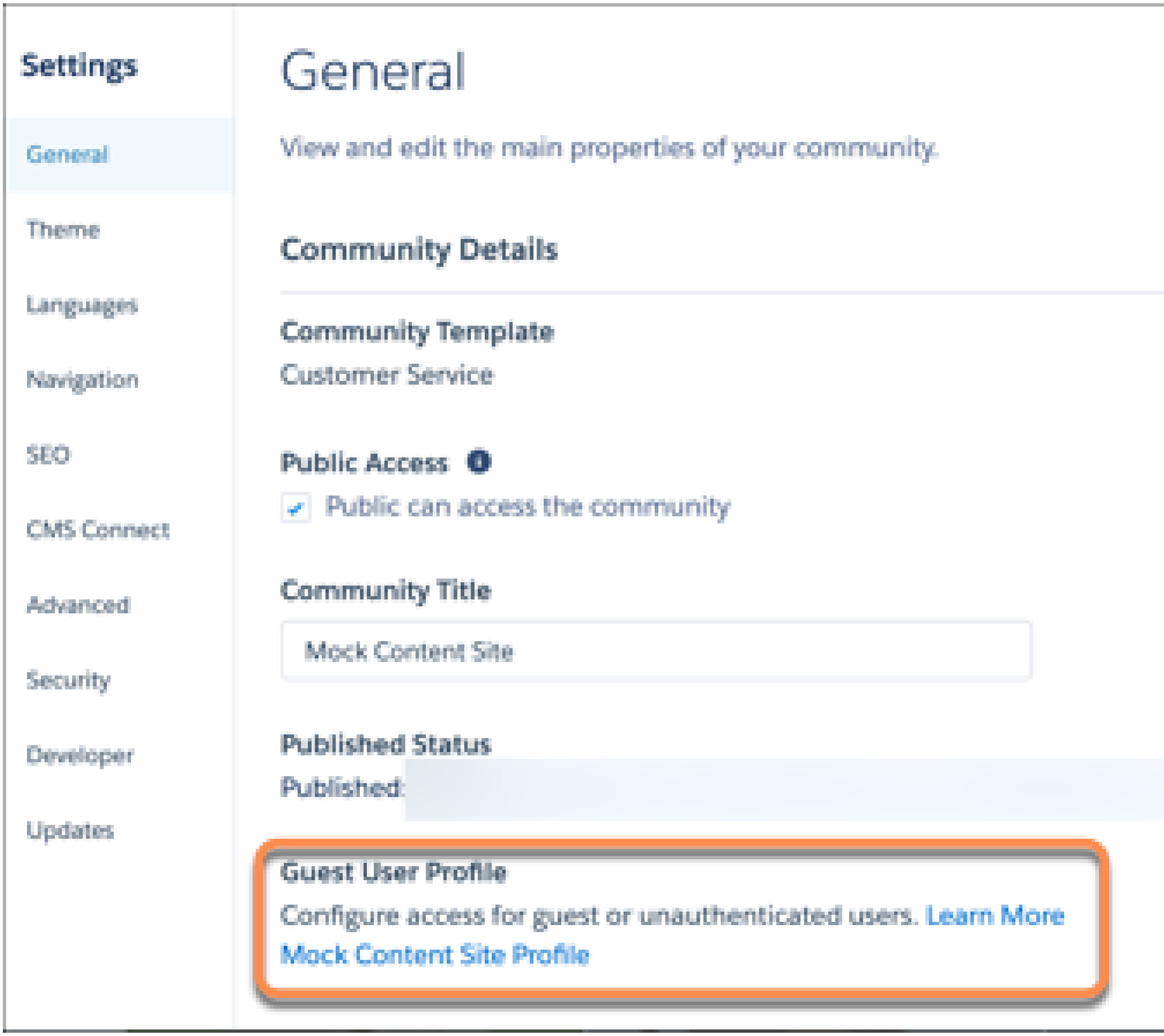
  Is a member of the Experience Cloud site

To edit app and system permissions in profiles:
- Manage Profiles and Permission Sets

To edit object and field permissions in profiles:
- Manage Profiles and Permission Sets

  AND

  Customize Application



5. Click **Edit**.
6. Scroll to the Standard Object Permissions section, and change the object permissions to meet your business needs.
7. Create a sharing rule for each object you want to share with your users.
8. Click **Save**.

For Salesforce Tabs + Visualforce sites, access the guest user profile from Experience Workspaces.

1. In Salesforce Setup, enter `digital experiences` in the Quick Find box and select **All Sites**.
2. Next to the site that you want to access, click **Workspaces**.
3. Select **Administration** > **Pages** > **Go to Force.com**.
4. Click **Public Access Settings** and change the access levels based on your needs.

IN THIS SECTION:

Best Practices and Considerations When Configuring the Guest User Profile

When configuring the guest user profile, keep these best practices and considerations in mind.

EDITIONS

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

General Best Practices and Considerations

- The guest user profile is specific to the particular Experience Cloud site. Check the guest user profile for each site to ensure data security.
- As long as the Experience Cloud site is active, guest users can access a subset of its pages, such as login and error pages.
- Use the Guest User Access Report AppExchange package to understand if records are being shared with guest users.

Sharing Settings

The **Secure guest user record access** setting limits the visibility and access that guest users have to your org's data.

Note: This setting is enabled by default and can't be disabled. The timelines for the rollout and enforcement of this setting are published in Guest User Security Policies and Timelines.

When this setting is enabled, guest users:

- Have org-wide defaults set to Private for all objects. This access level can't be changed.
- Can't be added to queues or public groups.
- Can't be given access to records through manual sharing or Apex managed sharing.
- Can be granted Read Only access to records only through guest user sharing rules. Guest user sharing rules are a special type of criteria-based sharing rule and count towards the limit of 50 criteria-based sharing rules per object.

  Warning: The guest user sharing rule type grants access to guest users without login credentials. By creating a guest user sharing rule, you're allowing immediate and unlimited access to all records matching the sharing rule's criteria to anyone. To secure your Salesforce data and give your guest users access to what they need, consider all the use cases and implications of creating this type of sharing rule. Implement security controls that you think are appropriate for the sensitivity of your data. Salesforce is not responsible for any exposure of your data to unauthenticated users based on this change from default settings.

Object Settings

- Review all default object permissions in the guest user profile, and then apply the most restrictive permissions for the guest user. For almost all objects, we recommend that the guest user has no access. If your business case calls for object data to be exposed to the guest user, set a maximum Read permission where possible.
- Enable the **Assign new records created by guest users to the default owner** setting so that guest users are no longer automatically the owner of records they create.
- Never assign the View All or Modify All permission to guest users.
- Never assign update or delete permissions to guest users.

System Permissions

- Review all system permissions, and then deselect the permissions that aren't necessary for your use case.
- Disable the View All Users permission if you don't want guest users to see other users of the site. The View All Users permission is of by default on guest user profiles in orgs created in Winter '20 and later.

  Note: When you deselect View All Users, guest users no longer have access to user or topic feeds in a site.

- Disable the Run Flows permission if guest users aren't using flows. If guest users need flow access, disable the pause option on flows that guest users are accessing.

API Usage

The API Enabled permission in system permissions lets external applications or connectors use the API to authenticate or access Salesforce data. Some examples of API usage are Workbench, Dataloader.io, Jitterbit, Excel Connecr, the Salesforce mobile app, Mobile SDK apps, Salesforce IoT, and connected apps.

- Check if the API Enabled permission is enabled for the guest user profile.
- Salesforce strongly recommends that you disable the API Enabled permission unless guest users explicitly need API access.
- Disable the permission in a sandbox first to see how guest user access is affected.

Visualforce Page and Apex

- Review all Visualforce and Apex pages that guest users can access. Remove pages that you don't want guest users to access.
- The following Salesforce-provided Visualforce pages are added by default to the guest user profile to provide common services, such as authentication flows or site maintenance.
  - BandwidthExceeded
  - CommunitiesLanding
  - CommunitiesLogin
  - CommunitiesSelfReg
  - CommunitiesSelfRegConfirm
  - CommunitiesTemplate
  - Exception
  - FileNotFound
  - ForgotPassword
  - ForgotPasswordConfirm
  - InMaintenance
  - SiteLogin
  - SiteRegister
  - SiteRegisterConfirm
  - UnderConstruction
- If your site doesn't offer self-registration, remove these self-registration pages from your guest profile:
  - CommunitiesSelfReg
  - CommunitiesSelfRegConfirm
  - SiteRegister

  - SiteRegisterConfirm

- Remove all other Visualforce pages unless they support specific business processes (ISV app, custom app).
- Restrict Apex classes for guest users. Allow Apex class access only for REST or SOAP API use. Apex classes that serve as Visualforce controllers don't need explicit access.
- In Apex class and subclass code, look for record updates or queries that don't check field-level security or object permissions or are in "without sharing" classes. Keep Apex and subclass code that runs without sharing or bypasses field-level security and object permissions to a minimum.
- If a guest user can execute an `@AuraEnabled` method in an Apex controller used by a Lightning component, always use the "with sharing" keyword.
- Add guest user profile access to any `@AuraEnabled` Apex class used by an Experience Cloud site.

Data Category Settings

- If Classic Knowledge is implemented in your org, check data category settings to ensure that guest users can access all the Salesforce Knowledge categories that you want them to.

Field-Level Security

- Review the field-level security of objects that guest users can access to ensure that they have access to the correct fields.
- Remove field-level access to fields that you don't want guest users to see.

Event Sync

If you use Einstein Activity Capture or Lightning Sync to sync events, follow the best practices to ensure that guest users don't have access to event data.

- Don't invite guest users to events.
- Don't use the same email address for a guest user and a non-guest user. Doing so could result in the guest user being added to events.
- Turn off the Access Activities permission on the Guest User profile unless access is necessary for your use case.
- If a guest user owns an event, delete or reassign the event. If a guest user is an invitee on an event, remove them from the organizer's event record. Or, you can delete the relevant EventRelation record using the API.

Configure the Site Guest User Record

Each time an Experience Cloud site is created, Salesforce creates a guest user profile and a site guest user record. The site guest user record is the only user record associated with the guest user profile.

1. In the guest user profile, click **Assigned Users**.
2. In the Full Name column, click the site guest user record link.
3. Make your changes, and click **Save**.

EDITIONS

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

USER PERMISSIONS

To access Experience Workspaces or Experience Builder:
- Create and Set Up Experiences

  AND

  Is a member of the Experience Cloud site

To edit app and system permissions in profiles:
- Manage Profiles and Permission Sets

To edit object and field permissions in profiles:
- Manage Profiles and Permission Sets

  AND

  Customize Application

IN THIS SECTION:

Best Practices and Considerations When Working with the Site User Record

Keep these best practices and considerations in mind when configuring the site user record.

EDITIONS

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

General Best Practices and Considerations

- Enforce authentication where possible, and lock down access to the site guest user.

Record Ownership

- The site guest user must never own records.
- When a guest user creates a record, such as a case via web-to-case or a record created via a flow, the site guest user is the record owner. If the record owner isn’t changed, anyone who has guest access to your Experience Cloud site can see the record. Enable the **Reassign new records created by guest users to the default owner** setting so that guest users are no longer automatically the owner of records they create.
- In some use cases, you might need to give Read access to guest users to newly created records (such as ideas created by guest users in a site). We recommend that you create a guest user sharing rule to grant record access.

Sharing Settings

The **Secure guest user record access** setting limits visibility and access that guest users have to your org's data.

Note: This setting is enabled by default and can't be disabled. The timelines for the rollout and enforcement of this setting are published in Guest User Security Policies and Timelines.

When this setting is enabled, guest users:

- Have org-wide defaults set to Private for all objects. This access level can't be changed.
- Can't be added to queues or public groups.
- Can't be given access to records through manual sharing or Apex managed sharing.
- Can be granted Read Only access to records only through guest user sharing rules. Guest user sharing rules are a special type of criteria-based sharing rule and count towards the limit of 50 criteria-based sharing rules per object.

  Warning: The guest user sharing rule type grants access to guest users without login credentials. By creating a guest user sharing rule, you're allowing immediate and unlimited access to all records matching the sharing rule's criteria to anyone. To secure your Salesforce data and give your guest users access to what they need, consider all the use cases and implications of creating this type of sharing rule. Implement security controls that you think are appropriate for the sensitivity of your data. Salesforce is not responsible for any exposure of your data to unauthenticated users based on this change from default settings.

Assign Records Created by Guest Users to a Default User in the Org

To increase the security of your Salesforce data, guest users are no longer automatically the owner of records they create. Instead, when a guest user creates a record, the record is assigned to a default active user in the org, who becomes the owner.

Select a default owner in your org.

1. From Setup, enter `Digital Experiences` in the `Quick Find` box, then select **All Sites**.
2. Click **Workspaces** for the community you'd like to access.
3. Click **Administration** > **Preferences**.
4. Select a default user in the record ownership lookup.
5. Click **Save**.

Note: In orgs created in Summer '20 and beyond, guest users can't be assigned as owners of previously created records in the org. If you don't select an owner for records created by guest users, the owner of the community is automatically selected as the owner.

IN THIS SECTION:

Best Practices and Considerations for Using the Guest Record Default Owner

Keep these best practices and considerations in mind when assigning a default owner to records created by guest users in Experience Cloud sites.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** editions

USER PERMISSIONS

To assign a default owner to records created by guest users in an Experience Cloud site:

- Create and Set Up Experiences
- AND is a member of the site

Best Practices and Considerations for Using the Guest Record Default Owner

Keep these best practices and considerations in mind when assigning a default owner to records created by guest users in Experience Cloud sites.

EDITIONS

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

General Best Practices and Considerations

- Any active user in an org (excepting guest users) can be assigned as the default owner of records created by guest users. However, only users with at least read access to the records can actually access them. Ensure that the user chosen as the default owner has at least read access on the records created by guest users.
- While the new default guest user field is helpful in assigning a record owner to records created by guest users, using the field as the sole way to assign users is not considered a best practice. Set up assignment rules, processes, or triggers to correctly assign records to different users or queues based on object or criteria.
- Make sure that you have more than one person being assigned as the owner of records created by guest users. One person owning all records created by guests leads to performance issues, and causes errors if the user is no longer active in the org.
- When possible, create and assign queues as owners of records created by guest users.
- Setting the default owner for records created by guests is an option in Experience Cloud sites.
- Check all out-of-the-box Salesforce flows that impact guest users, such as the Contact Us page and assignment rules, and ensure that they are working as expected.
- Reassign records in your org that are owned by the guest user site user. Use Data Loader to migrate existing records owned by guest users to a new designated user in the org.
- Avoid using Apex future methods to insert `ContentVersion` for guest users.

`OwnerID` VS. `CreatedByID` Fields

- Any existing conditions in rules and processes (such as assignment rules, processes, criteria-based sharing rules, flows, and list views) that are based on `OwnerId` equaling the guest user ID must be updated to `CreatedByID`. Remove any rules or processes that rely on the guest user ID as the owner.
- Review internal processes and ensure that employees and teams still have access to guest user records.

Apex Without Sharing

While using Apex without sharing is an option, use it rarely and with extreme caution.

- Any Apex code that creates and updates a record (in a single transaction) as a guest must run without sharing, also known as system mode. In such cases, when Apex code runs without sharing, the guest user should only update records they've just created, and no other record in Salesforce.

  Note: See Create Custom Component for Guest User Flows for an example of a component code for flows that uses an Apex class without sharing.

- You may have a multi-step flow for guest users that creates a record and then updates the record. To allow the guest user to run the flow, save the flow with the **System Context Without Sharing—Access All Data** option.
- Custom implementations that create a record and view or update it later must use an encrypted key to identify and access the record (usually an encrypted record ID), Apex without sharing, and extra checks in the Apex class (for the subsequent VIEW or UPDATE process) to limit record exposure. Limit the scope of key encryption, and narrow down the records that can be updated to specific use cases. Always check to make sure that the record is created by the guest user.

Behavior Change After Record Creation

- If your implementation is using the out-of-the-box behavior for record creation, guest users who create a record see a toast message and are redirected to the page they were using before record creation. If you'd like to create a different experience for guest users, use flows in System Mode to redirect guest users to a different custom screen after they create a record.
- Your custom implementation may allow a guest user to create a record, after which the guest user automatically sees the record detail page of the just-created record. However, the guest user loses access to the just-created record, since the record owner is assigned to a different user in the org. In this case, consider changing your implementation so the guest user is taken to a different part of your site after creating a record.
- Guest users may have the option of associating a newly created record to a parent record via a lookup (for example, creating a contact and associating it to an account).If guest users create a new parent record via a lookup, they see an error in the org (because upon creation, the guest user loses access to the parent record). To avoid error messages, you can:
  - Ensure that your org has a parent record shared with guest users via a sharing rule, so the newly created record can be associated with it. The parent record should not contain any sensitive data; or
  - Remove the create object permission for guest users.

Secure Data Accessible by Guest Users

EDITIONS

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

Protect your data by securing the data created by unauthenticated guest users prior to Salesforce's enforcement of the guest user security policies in the Winter '21 and Spring '21 releases.

Secure records that were created by or shared with guest users before the enforcement of the guest user security policies in the Winter '21 and Spring '21 releases. This data includes records created before Winter '21 that are:

- Owned by guest users
- Shared to queues or public groups that a guest user is a member of
- Shared with a guest user manually or using Apex-managed sharing

After the enforcement of the new security policy in Winter '21, guest users could no longer own records, be added to queues or public groups, or have records shared with them using manual- or Apex-managed sharing. However, the security policy didn't work retroactively: If guest users had access to records before Winter '21, they continue to have access until you secure the records.

IN THIS SECTION:

Discover Which Records Are Available to Guest Users

Use the Guest User Access Report, available for free on AppExchange to see which objects and permissions guest users can access from your public sites. The report shows you the total number of records per object that the guest user can access. The report also categorizes records owned by the guest user, records shared with guest users with manual or Apex sharing, and queue or public group membership information.

Reassign Records Owned by Guest Users

After the enforcement of the security policies introduced in Winter '21, any record created by guest users is assigned to a default internal owner. However, guest users still own records they created before Winter '21.

Remove Guest Site Users from Queues and Public Groups

Queues and public groups created before the Winter '21 enforcement of guest user security policies can still have guest site users as members. Guest users being part of a queue or public group is a concern because any record shared with the public group is visible to the guest user, which can be anyone on the internet. Also, it's possible that other members in the group aren't aware of the guest user's access to their records.

Remove Records Shared Manually or via Apex Managed Sharing

With the Guest User Access Report, you can find records that were shared with guest users manually or via Apex sharing before the Winter '21 enforcement of the guest user security policy. You can then delete the records manually or by using DataLoader or Workbench.

Discover Which Records Are Available to Guest Users

Use the Guest User Access Report, available for free on AppExchange to see which objects and permissions guest users can access from your public sites. The report shows you the total number of records per object that the guest user can access. The report also categorizes records owned by the guest user, records shared with guest users with manual or Apex sharing, and queue or public group membership information.

Here's an example of a Guest User Access Report.

Object Name	Is Custom?	Is Exposing Data?	Total Number of Records with Access To	Total Number of Records Owned	Total Number of Records due to Manual and/or Apex Sharing	Total Number of Records due to Non-Guest Sharing Rules	Total Number of Records due to Guest Sharing Rules	Profile Read Access?	Profile Create Access?	Profile Edit Access?	Profile Delete Access?	Profile View All Access?	Profile Modify All Access?
account	false	no risk	0	0	0	0	0	potential risk	no risk	no risk	no risk	no risk	no risk
contact	false	no risk	0	0	0	0	0	potential risk	no risk	no risk	no risk	no risk	no risk
custom_object_1__c	true	potential risk - Help me secure this	3	0	1	1	0	potential risk	no risk	no risk	no risk	no risk	no risk
custom_object_2__c	true	potential risk - Help me secure this	3	N/A	N/A	N/A	N/A	potential risk	no risk	no risk	no risk	no risk	no risk
custom_object_3__c	true	no risk	0	0	0	0	0	potential risk	no risk	no risk	no risk	no risk	no risk
custom_object_4__c	true	potential risk - Help me secure this	1	0	0	0	0	potential risk	no risk	no risk	no risk	potential risk	no risk
user	false	potential risk - Help me secure this	16	N/A	0	0	0	no risk	no risk	no risk	no risk	no risk	no risk

After you determine which records guest users can access, you have three options to secure the records:

- If record sharing is due to ownership, reassign the records owned by guest users to other users in your org.
- If record sharing is due to guest user membership in queues or public groups, remove guest users from queues and public groups.
- If record sharing is due to manual or Apex sharing, remove records shared via manual or Apex sharing.

Reassign Records Owned by Guest Users

After the enforcement of the security policies introduced in Winter '21, any record created by guest users is assigned to a default internal owner. However, guest users still own records they created before Winter '21.

A site guest user in an org is one user record, and all guest users are assigned to that user record. Essentially, anyone on the internet is considered a guest user when it comes to accessing a Salesforce site. That means that anyone on the internet is also an owner of any records in the org that the site guest user owns.

To fix the ownership, query the records with tools like listviews, Data Loader, or Workbench. For each public site, filter on the record owner field (ID or name) equaling the guest site user. You can find the guest site user name by looking at the Assigned Users in each guest user profile. You can also use listviews or reports to filter object records by the owner field.

When you have the guest user's records, reassign ownership of the records to an authenticated user. You can do this manually in the UI on a record-by-record basis. But if you have a large quantity of records, use Dataloader or Workbench to mass-update the records.

This SOQL query finds account records owned by the guest user. Replace `Account` with the object you're querying.

```
SELECT Id, OwnerId FROM Account WHERE OwnerId = '[GuestUserRecordId]'
```

Remove Guest Site Users from Queues and Public Groups

Queues and public groups created before the Winter '21 enforcement of guest user security policies can still have guest site users as members. Guest users being part of a queue or public group is a concern because any record shared with the public group is visible to the guest user, which can be anyone on the internet. Also, it's possible that other members in the group aren't aware of the guest user's access to their records.

To see which queues or public groups include guest users, use the Guest User Access Report, and then remove them.

You can remove guest users from queues and public groups in Salesforce Setup.

For public groups:

1. From Setup, in the Quick Find box, enter `Public Groups`, and then click **Public Groups**.
2. For each group that has guest users as a member, remove the guest user and save.

For queues:

1. From Setup, in the Quick Find box, enter `Queues`, and then click **Queues**.
2. For each queue that has guest users as a member, remove the guest user and save.

Remove Records Shared Manually or via Apex Managed Sharing

With the Guest User Access Report, you can find records that were shared with guest users manually or via Apex sharing before the Winter '21 enforcement of the guest user security policy. You can then delete the records manually or by using DataLoader or Workbench.

Any record shared with guest users manually or via Apex sharing is potentially accessible to any user accessing the site from the internet. There is a risk of data being inadvertently shared.

This query returns any records shared with the guest user manually or via Apex sharing.

```
SELECT Id,[ParentId],RowCause,UserOrGroupId FROM [shareObject] WHERE UserOrGroupId IN
[userOrGroupIdList] AND RowCause != 'Owner' AND RowCause != 'Rule' AND RowCause !=
'GuestRule'
```

- Substitute `[parentId]` with the correct field for standard object shares. For custom objects, it's `[parentId]`.
- Substitute the `[shareObject]` with the value of the API name of the share object. For example, for the `Account` object, the share object is called `AccountShare`. For a custom object called `Custom_Object_1__c`, the share object is called `Custom_Object_1__Share`.
- Substitute the `UserOrGroupIdList` with a list of IDs for any Public Groups that the guest user is a part of, in addition to the record ID of the guest user record. Also, removing the guest user from any public groups is recommended, in which case this value can be the guest user record ID.

Delete these records manually or by using DataLoader or Workbench.

SEO Best Practices and Considerations for Guest Users

To configure your site for search engine optimization (SEO), Salesforce uses the guest user profile to identify the public pages and objects available for indexing. A search engine is considered a guest, or unauthenticated, user. ForExperience Builder sites, Salesforce automatically generates a sitemap with a list of the publicly accessible content. For sites built with Salesforce Tabs +Visualforce, you are responsible for creating the sitemap and indicating which pages are included.

Available in: Salesforce Classic and Lightning Experience

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

Experience Builder Sites

You identify the standard and custom, but not chatter, objects available for SEO using the Experience Builder guest user profile. Objects and associated fields assigned read access are added to the sitemap.

- To control the scope of your sitemap and help keep your site secure, regularly review which objects are public and the number of records exposed for each object. From Experience Builder, go to **Settings** > **SEO** > **Object Access** list. It can take up to 24 hours for the **Object Access** list to be refreshed and include object pages and records newly made public.

- Even though an object and its fields are public, Salesforce security settings still determine guest user access to this data. To ensure that object data is available to search engines, review the sharing rules, field-level security (FLS), and permission sets assigned to that object.
- Make sure that all sensitive objects are private, even the objects used in private pages not included in the sitemap. All public pages and public objects are discoverable. because search engines use the sitemap only as a starting point to identify which site content is available for crawling.

Salesforce Tabs + Visualforce Sites

- In your sitemap, include only publicly accessible Visualforce pages and objects that you want discoverable by search engines.
- Use robots.txt for more control over which data is available for search engines to index when they crawl your site.
- Submit your sitemap to search engines, such as Google Search Console, only after completing the previous steps.

Note:

- The generation of your sitemap.xml file is limited to production environments. The file isn't created in sandbox.
- All standard and object pages that require authentication as part of a publicly accessible site aren't included in the sitemap file. As a result, they aren't exposed to search engines for indexing.

SEE ALSO:

SEO for Experience Builder Sites
Make Objects Available for SEO
Configure the Guest User Profile
Best Practices and Tips for Using SEO in Your Experience Cloud Site

Control Public Access to Your Experience Builder Sites

Set the public access level to your Experience Builder site, and set page-specific access to your site pages.

If you allow public access, your Experience Cloud site pages are accessible to the public, including unlicensed users. If don't allow public access, members must log in to access the site.

1. To enable public access in an Experience Builder site, open Experience Builder.
    - From the All Sites page in Setup, click **Builder** next to the site name.
    - From a site, click **Experience Builder** in the profile menu.
2. Click **Settings**.
3. Select **Public can access the site**.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To customize an Experience Cloud site:

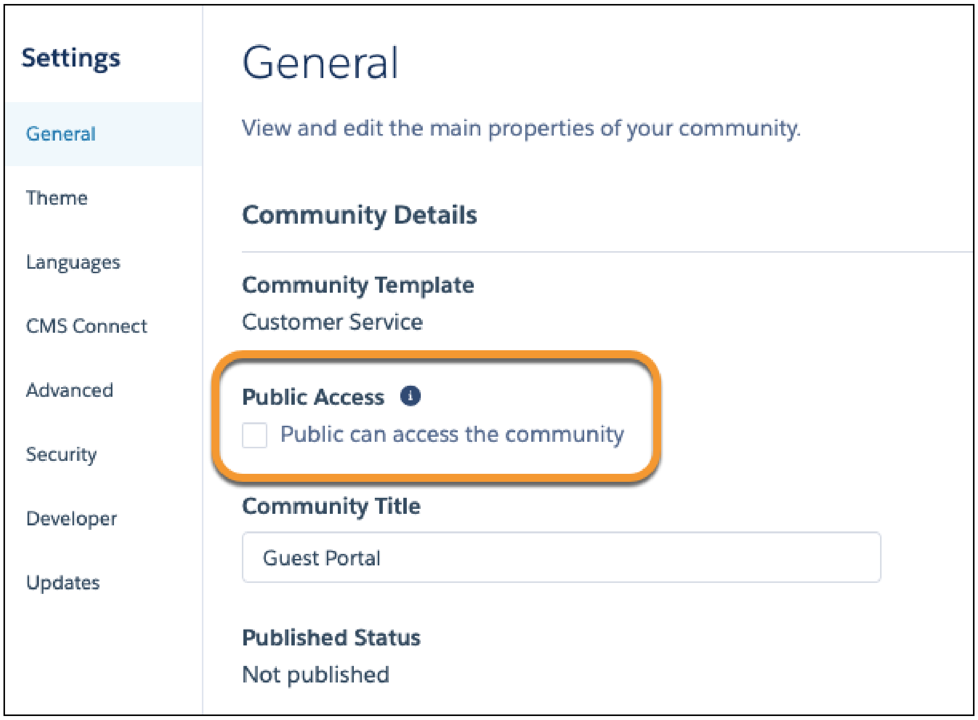
- Be a member of the site AND Create and Set Up Experiences

  OR
- Be a member of the site AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR
- Be a member of the site AND an experience admin or publisher in that site

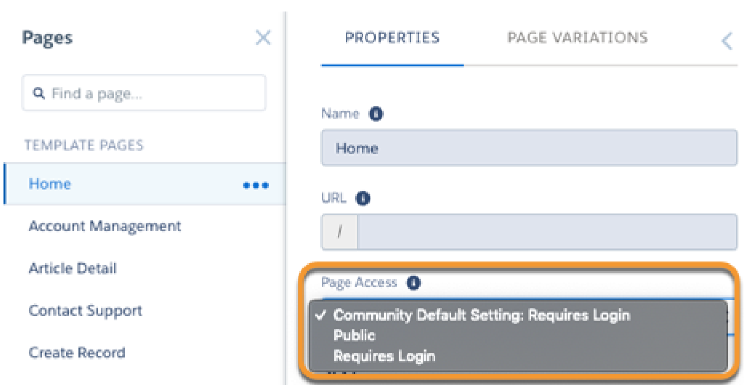


You can also set page-level access to specific Experience Builder site pages in Page Properties.

Site Default Setting
Reflects your choice for public access under General Settings.

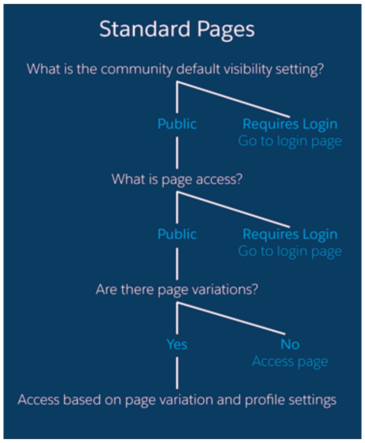
Public
Makes the page public regardless of the site's default setting.

Requires Login
Makes the page private and requires members to log in, regardless of the site's default setting.

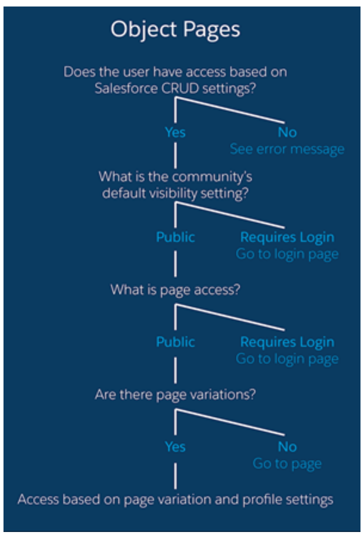


How do these settings work with audience criteria-based page visibility in Experience Builder? When a member is trying to access a page, Salesforce first checks the site's default setting. Is it public or does it require users to log in? Then Salesforce looks at the page access. When that's cleared, Salesforce checks the audience criteria-based visibility that you set in Page Variations.

How does this logic work for standard pages?



And what's the logic behind pages that show object data?



You can also set privacy settings for some components, such as the Tabs and the Navigation Menu components. To make a component on a public page visible to guest users, select **Publicly available** in the component's properties.

Important:

- Regardless of the settings, some pages are always public, and others are always private. Public pages include login-related pages (Login, Register, Forgot Password, Login Error, Check Password). The Messages page for direct messages is always private.
- If public access is enabled in Experience Builder at the page or site level, the **Let guest users view asset files and CMS content available to the site** preference is enabled in **Administration** > **Preferences** in Experience Workspaces. This preference lets guest users view asset files and CMS content available in the site on publicly accessible pages. Asset files include images associated with topics, recognition badges, site branding, and account branding. The preference remains enabled as long as the page has public access enabled.

IN THIS SECTION:

Best Practices and Considerations for Page-Level Access in Experience Builder

Experience Builder is a powerful tool for keeping your Experience Builder site secure. Keep these best practices and considerations in mind when working with access levels.

- Don't create object pages for objects that aren't exposed to external users. If you have object pages that aren't being used, delete them.
- Use specific object pages when possible. These pages make public URLs more discoverable to your users.
- If you set up object pages for authenticated users, test the pages to ensure that guest users can't see them.

Experience Builder Sites Search Best Practices and Considerations for Guest Users

When setting up your search pages and components for Experience Builder sites, keep these best practices and considerations in mind to keep data secure from guest users.

Search Page

- Review page access settings for the search page to ensure that you want the search page accessed by guest users.
- To limit access to the search page, consider creating a search page variation with a guest audience.

Global Search Results Component

The Global Search Results component is the main component on the Search page in any Experience Cloud site. The component allows admins to select the objects shown in search results.

- Guest users only see results on objects they have access to.
- Actual record access for the guest user isn't limited to the objects the admin configures in the Global Search Results component. The guest user can have access to other objects based on org sharing configurations.
- Always check the org's sharing model (including org-wide defaults and sharing rules) to ensure that the guest user doesn't have access to your org's sensitive data.

Search Box Component

- As with the Global Search Results component, the admin sets up which objects to show in searches. However, record access for the guest user isn't limited to the objects the admin configures in the Global Search Box and Global Search for Peer-to-Peer Communities components. The guest user can have access to other objects based on org sharing configurations.
- Always check the org's sharing model (including org-wide defaults and sharing rules) to ensure the guest user doesn't have access to your org's sensitive data.

Search for Experience Cloud Site Users from Your Org's Global Search

With global search from your internal org, you can get uneven results when searching for a site User record. Here's why and what you can do about it. Each site has a unique network ID. When you create a site user through **Contact record** > **Create External User**, the new User record is assigned to a site's network ID.

Global search looks for records in the internal org, which has a different network ID than the site. A global search doesn't search insidesites. Since the User record is associated with a site network ID, global search doesn't return results for that record.

The workaround is to create User records in the internal org, and then associate the records to a site. You can associate an internal User record to a site by linking the internal record to a Contact record. After you forge the link, you can find the User record through global search. The User record's network ID is now associated with the internal org.

Set Up Web-to-Case for Guest Users in an Experience Builder Site

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

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

Tip: Assign case field-level security and guest user actions appropriately so guest users have access to what they need but can't see your company private information. We always recommend that you authenticate users who are creating or interacting with records.

1. From Setup, enter `Web-to-Case` in the Quick Find box, then select **Web-to-Case**.
2. Select **Enable Web-to-Case**.
3. To ensure that guest users can log cases through contact support, from Setup, enter `Digital Experiences` in the Quick Find box, then select **All Sites**.
4. Select **Builder** next to the site you want to edit.
5. Drag the Create Case Form component on any page.
6. Configure the component properties.

Important: When guest users create cases using Web-to-Case, the case owner field is set as the site guest user. Set up an assignment rule, trigger, process, or flow to automatically change the record owner to a user or queue within your org. If the site guest user remains the case owner, anyone who has guest access to your site can see the record in question.

Object-Specific Security Best Practices for Guest Users

After you configure the guest user profile and the site guest user record, keep object-specific best practices in mind for guest user access.

IN THIS SECTION:

Chatter and Discussions Best Practices and Considerations for Guest Users

Turning on Chatter for Experience Cloud sites enables discussions among your users. Keep these best practices and considerations in mind when you're setting up Chatter and discussions.

General Best Practices

- To assign or remove Chatter-specific permissions to guest users, check System Permissions in the guest user profile.

Groups

- Give only internal and trusted members the ability to create groups. Consider a group creation workflow with an approval process.
- Keep the number of groups to a minimum, and audit your site's groups on a regular basis.
- Keep groups private whenever possible.
- Consider a process on who can manage groups.
- Make sure that the content in the group detail page meets your site's content standards.
- Review files that are publicly accessible and associated to groups to make sure that they meet your site's content standards.

User-Generated Content

- Set up moderation rules for all content created by users.

Topics

- Enforce a minimum access policy for topics.
- Never assign guest users Create Topics or Assign Topics user permissions.
- Carefully choose who can create topics in a site.
- Deselect **Suggest topics in new posts** in **Experience Workspaces** > **Administration** > **Preferences**.

Enabling API Access to Chatter for Guest Users

The following Lightning and Visualforce pages and components in Experience Cloud sites need access to underlying Chatter capabilities to load correctly for guest users. Enabling public access through the guest user profile and the API exposes data for guest users through Connect in Apex. Enabling public access in this way is helpful when you're building your own site pages from scratch.

- Case
- Featured Feeds
- Feed
- Group
- Group Detail
- Headline
- Record Information Tabs
- Related Articles
- Related Lists
- Reputation
- Search & Post Publisher

- Topic Detail

To enable access to Chatter functionality, access Experience Workspaces.

1. Select **Administration** > **Preferences**.
2. Select **Give access to public API requests on Chatter**.
3. Click **Save**.

Files Best Practices and Considerations for Guest Users

To view a file on a record, Experience Cloud site users need access to the record, and record file visibility must allow site users. Use the Customer Access switch on a file's sharing detail page to allow customers to see individual files on records. Files shared with users, Chatter groups, and topics follow the same sharing model as the objects that the files are shared on. Files in Libraries can be exposed to site users, but the user must be added as a member of the library.

The logic for sharing files with Experience Cloud site users also applies to guest users. If guest users have access to an object, they can have access to files shared with that object, if the file visibility allows site users.

Use this site preference to give guest users access to files: Give access to public API requests on Chatter.

Note: Guest users can't delete files, including files that they own.

Note: Guest users can view Notes and Attachments but not the Files Related List.

- Review permissions for who can create content deliveries and public links to make sure that they align with your business needs.
- Review library membership and permissions to make sure that they meet your business needs.
- You can add both users and public groups as members of a Content Library. Public groups pose a risk of extending access beyond who you want to have access.
  - Review who are library administrators. Admins have the power to add more library members.
  - Don't add a public group to a library unless you know who is in the group and the type of members who will be added in the future.
  - Review which library permissions grant the ability to create content deliveries (the Deliver Content permission).
- Add Asset Files to Asset Libraries that do not contain folders, and configure the Asset Library to be visible to guest users.

  Note: Only Salesforce CRM content users can access content folders in the Asset Library.

- Make sure that unintended files aren't public.
  - Query ContentAsset to check for the field isVisibleByExternalUsers.
  - Query documents to check for the field IsPublic.
  - Query StaticResource to check whether the CacheControl field is set to Public.
- Audit file visibility on records.
- Export ContentVersion to get a list of all files in the org. Export ContentDocumentLink to see all the records that the files are shared with and what the file visibility is for the share to the record.

  Note: For each file, you see multiple shares, such as one share to the owner and multiple shares to different records. Some rows, such as a share to the owner could have the visibility set to AllUsers, but this setting doesn't grant access to site users. Only shares to records that have the visibility set to AllUsers mean that site users who have access to that record have access to its related files.

- Salesforce doesn't remove geolocation information from uploaded images.

Test Guest User Access in Your Experience Cloud Site

After you've implemented the recommended security settings, take your Experience Cloud site on a test drive to see what guest users see.

> Note: Guest user access only applies to sites created with Experience Cloud. Portals created with the legacy Salesforce portals product don't have guest user access.

- Access your site using an incognito window to make sure that you're logged out.
- Browse to each public page to make sure that your guest user has the correct access level.
- Browse to object pages to see what the guest user can see.
- Do a global search in the site for specific records to see a search results page.
- Access the site from a mobile device to see the mobile guest user experience.
- Access direct links to various object detail pages as a guest user to ensure that there's no access.
- Access `[www.domain.com]/[siteprefix]/sitemap.xml` to view what is listed in your sitemap to guest users. The sitemap.xml shows what information is exposed to search engines.

Control Which Users Experience Cloud Site Users Can See

User sharing lets you decide whether all users in an Experience Cloud site are visible to each other.

There are three settings to consider when setting up sharing for external users.

Portal User Visibility: If enabled, portal users in the same customer or partner portal account can see each other, regardless of the organization-wide defaults.

Site User Visibility: This setting controls whether user sharing is available for authenticated users in your org's communities. If enabled, you have the option of selecting **See other members of this community**, with turns visibility on or off, on a community-by-community basis.

Guest User Visibility: The **Let guest users see other members of this site** setting controls whether user sharing is available for unauthenticated (guest) users in your Experience Cloud sites. You grant guest user visibility on a site-by-site basis by selecting **Let guest users see other members of this site**, with turns visibility on or off.

> Note: If users have been shared with other users via manual sharing or other sharing rules, they still see one another regardless of community or portal user visibility settings. Users who have been shared with other users must be members of a site to be accessible by another member.

Let's see how Portal User Visibility and Site User Visibility work together in authenticated use cases.

	Site User Visibility	Portal User Visibility	Result
Scenario 1	Disabled	Disabled	Experience Cloud site users are visible only to themselves and users higher in the role hierarchy who are members of the same site
Scenario 2	Disabled	Enabled	Experience Cloud site users can see other Experience Cloud site users in the same account and the same site
Scenario 3	Enabled	Disabled	Experience Cloud site users can see all other Experience Cloud site users (as long as they

	Site User Visibility	Portal User Visibility	Result
			are members of the same site), even if they don't belong to the same account
Scenario 4	Enabled	Enabled	Experience Cloud site users can see all other Experience Cloud site users that they are members of, even if they don't belong to the same account

Note: If the View All Users permission is selected on a profile, Experience Cloud site users with that profile are able to see all the users in the org.

IN THIS SECTION:

SEE ALSO:

Control User Visibility in Your Experience Cloud Site

Control User Visibility in Your Experience Cloud Site

Change your org's settings to control your Experience Cloud site's user visibility for authenticated members and guest users.

1. From Setup, enter `Sharing Settings` in the `Quick Find` box, then select **Sharing Settings**.
2. Click **Edit** in the Organization-Wide Defaults area.
3. Enable **Portal User Visibility**or **Site User Visibility** based on your org's needs.
4. Click **Save**.

Note: To view record names in lookup fields and system fields, such as Created By and Last Modified By, select the **Require permission to view record Names in lookup fields** checkbox. Then enable the View All Lookup Record Name permission in custom profiles or permission sets for users who must see record names in all lookup and system fields, regardless of sharing settings.

You can manage user visibility and guest user visibility on a site-by-site basis.

1. From Setup, enter `Digital Experiences` in the `Quick Find` box, then select **Digital Experiences** > **All Sites**.
2. Click **Workspaces** for the site you'd like to access.
3. Click **Administration** > **Preferences**.

EDITIONS

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

USER PERMISSIONS

To edit sharing settings:
- Manage Sharing

To set up user visibility in a specific site:
- Create and Set Up Experiences

  AND

  Is a member of the site

4. Select the **See other members of this site** or **Let guest users see other members of this site** checkboxes based on your site's needs.
5. Click **Save**.

Note: To see user profile photos for other users in your site, select the **See other members of this site** or **Let guest users see other members of this site** checkboxes. User profile photos display in feeds by default.

Site User Visibility Best Practices for Guest Users

Site members and guest users must often see one another in a public setting. Guest user visibility is useful when you implement a public forum, like a self-service community, or build a public-facing app, like ideas. Keep these guest user visibility practices and considerations in mind when setting up your public-facing forum or site.

- Protect the identity of your most active users by hiding the Knowledgeable Users and Reputation Leaderboard components using audience targeting in Experience Builder.
- Never use the View All Users permission to give guest users visibility to other users.
- The Site User Visibility setting in Sharing Settings is org-wide. Never use this setting to grant visibility to other users.
- The Site User Visibility setting doesn't control guest user visibility. Guest user visibility is done on a community-by-community basis.
- To give user visibility to site users, enable **See other members of this site** on a site-by-site basis.
- If your community or forum must remain private, don't use the Site User Visibility setting. This setting shows authenticated users to guest users. Instead, use sharing rules or sharing sets on the user record to open up user visibility where needed.
- Consider using nicknames to protect the identity of your site's members.
- Review the user profile page layout, and restrict exposed fields to a minimum.

Which Experience Cloud Template Should I Use?

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

Experience Cloud templates let you build responsive sites for delivering rich, branded spaces for your customers and partners. And with Experience Builder, you can accomplish a lot without coding. For example, you can edit a template's components to include information about your site, add images to extend your branding, and include CMS content. And if you want a more customized experience, you can create custom pages, add components to pages, build custom Lightning components, and expose more Salesforce objects.

Note: Apart from Salesforce Tabs + Visualforce, all templates are Lightning-based templates that you customize in Experience Builder. However, although the Aloha template is Lightning-based, it's used to create an App Launcher, not a site. So when we talk about *Experience Builder sites and templates*, we mean all templates except Aloha and Salesforce Tabs + Visualforce.

Customer Account Portal

A private and secure place for customers to access and update their account information. Improve customer relationships and decrease service costs by letting customers work in the portal. Customers can see and pay invoices, update their account information, and search your knowledge base for answers to their most frequent questions.

Partner Central

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

Customer Service

A powerful, responsive self-service template with multiple prebuilt theme options. The Customer Service template lets users post questions to the community, search for and view articles, collaborate, and contact support agents by creating cases. Supports Knowledge, Chatter Questions, and cases.

Help Center

A public-access, self-service community that exposes the articles that you make available from your knowledge base. You reduce the load on your customer support team, and your users get the satisfaction of finding their own solutions.

Build Your Own (Aura)

Provides the basic pages that every Experience Builder site needs: Home, Create Record, Error, Record Detail, Record List, Related Record List, Search, Check Password, Forgot Password, Login, Login Error, and Register. Add more pages and components as needed for the experience you're building. To refine the look of your site, customize your branding and themes.

Build Your Own (LWR)

Powered by the new Lightning Web Runtime (LWR) platform, this customizable template delivers unparalleled page performance and improves developer productivity. Quickly build pixel-perfect pages and develop Lightning web components and themes to match your unique brand.

Suitable for developers, consulting partners, and ISVs who are familiar with developing custom Lightning web components, and working with Salesforce DX, User Interface API, and Apex. See the LWR Sites for Experience Cloud guide.

Aloha

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

Salesforce Tabs + Visualforce

Standard Salesforce structure and tabs that you can customize using Visualforce. Requires developer experience and advanced setup skills. Allows full platform access with a flexible configuration and supports most standard objects, custom objects, and the Salesforce mobile app.

Salesforce Tabs + Visualforce isn't a Lightning-based template and therefore doesn't work with Experience Builder.

> **Note:** As part of their phased retirement, from Summer '17, you can no longer use the Koa and Kokua templates. Salesforce still supports existing Experience Builder sites that were built using Koa and Kokua. To create a site based on Koa or Kokua, contact Salesforce Support. However, we recommend that you work with Salesforce Support on a plan to replace your existing Koa and Kokua sites. The latest Experience Builder templates provide richer support for Knowledge and case management.

IN THIS SECTION:

The Build Your Own Template (Aura)

The Build Your Own template provides the basic pages every Experience Builder site needs: Home, Create Record, Error, Record Detail, Record List, Related Record List, Search, Check Password, Forgot Password, Login, Login Error, and Register. And you can easily add more pages and components as needed for the experience you're building. Customize your branding and themes to refine the look of your site.

The Build Your Own Template (LWR)

Use the Build Your Own (LWR) template for Experience Cloud to create blazing-fast digital experiences, such as websites, microsites, and portals, using the Lightning Web Components programming model. Powered by Lightning Web Runtime (LWR), this customizable template delivers unparalleled site performance.

The Microsite Template

The Microsite template is the foundation for your small, special-purpose websites. Microsites are often used by companies that already have a full site but want a dedicated space for a single communication or conversion goal. Microsites work well to host an idea or product that requires more content than a single landing page. Built on the Lightning Web Runtime (LWR) platform, the template includes responsive layout and content components that you can use to quickly spin up a landing page, event site, or other web experience. Capture visitor information and send it directly to the Lead object with the Lead Form component.

Objects Supported by Out-of-the-Box Components and Pages in Experience Builder Templates

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

Customer Service Experience Builder Template Setup Checklist

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

Migrate a Koa or Kokua Site to a New Template

The Koa and Kokua templates are in phased retirement, and you can no longer use them to create site. Salesforce supports existing sites built with Koa and Kokua, but we recommend migrating to newer templates. The new templates provide richer support for Salesforce Knowledge and case management, and they also receive updates and new features with each release.

Which Components Can I Use with Each Aura Template?

Aura site templates, such as Customer Service and Partner Central, are each composed of pages, which in turn are made up of customizable components. Consult this table to find out which Aura template each component can be used in, and when the component became available.

SEE ALSO:

Create an Experience Cloud Site

Choosing Between Experience Builder and Salesforce Tabs + Visualforce Sites

The Customer Account Portal Template

The Customer Account Portal template improves customer relationships and decreases service costs. The template provides features that make it easy for customers to see and pay invoices, update their account information, and search your knowledge base for answers.

Included Features

- Experience Builder pages and components
- Tile menu, for a visual navigation experience
- Global search with a customizable list of searchable objects

- Dashboards and reports
- Customizable branding and design
- Rich, responsive look and feel across multiple devices

Advanced Features That You Can Configure

- Audience targeting—Deliver custom content to partners by geography, tier, or other criteria.
- Lightning components—Check out the full list of compatible Lightning components that you can use to build out your site.

Included Pages

The Customer Account Portal includes the following pages.

- Home
- Account Management
- Article Detail
- Contact Us
- Create Record
- Dashboard
- Error
- Feed Detail
- File
- Flow
- Generic record pages
- Login
- Messages
- My Account
- Question Detail
- Quip Docs Related List
- Report
- Report Builder
- Resources
- Search
- Top Articles
- Topic Catalog
- Topic Detail
- User
- User Settings

The Partner Central Template

Partner Central is designed to support partner relationship management workflows: channel sales, channel marketing, lead distribution, deal registration, and partner recruitment and onboarding. Plus, Partner Central also includes functionality to map reports and dashboards for monitoring your pipeline.

What You Get Out-of-the-Box

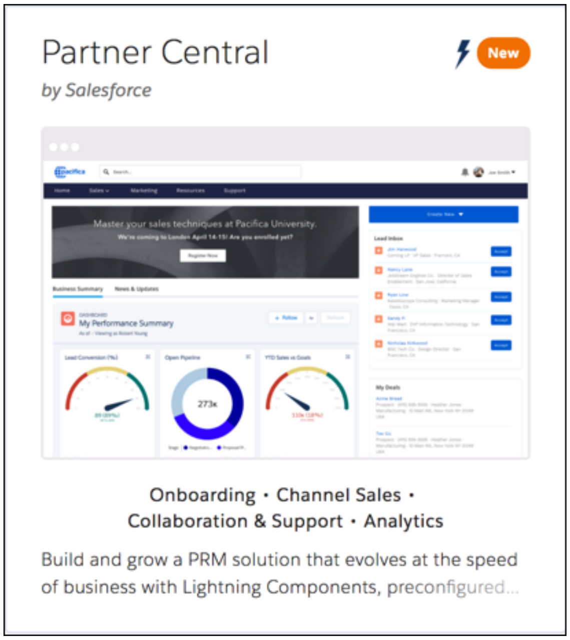
- Guided setup
- Experience Builder pages and components
- The Lead Inbox component to pass leads to partners
- Customizable Quick Create action menu that you can configure for deal registration
- Customizable navigation menu with preconfigured list views for leads, deals, and campaigns
- Global search with a customizable list of searchable objects
- Dashboards and reports
- Customizable branding and design
- Collaboration features such as groups, feeds, topics
- Rich, responsive look and feel across multiple devices

Advanced Features You Can Configure for Partner Central

- Audience-targeting: Deliver custom content to partners by geography, tier, or other criteria.
- Analytics: Configure Analytics reports for your site.
- Google Analytics™: Track site activity with Google Analytics.
- Lightning Components: Check out the full list of compatible Lightning components you can use to build out your site.

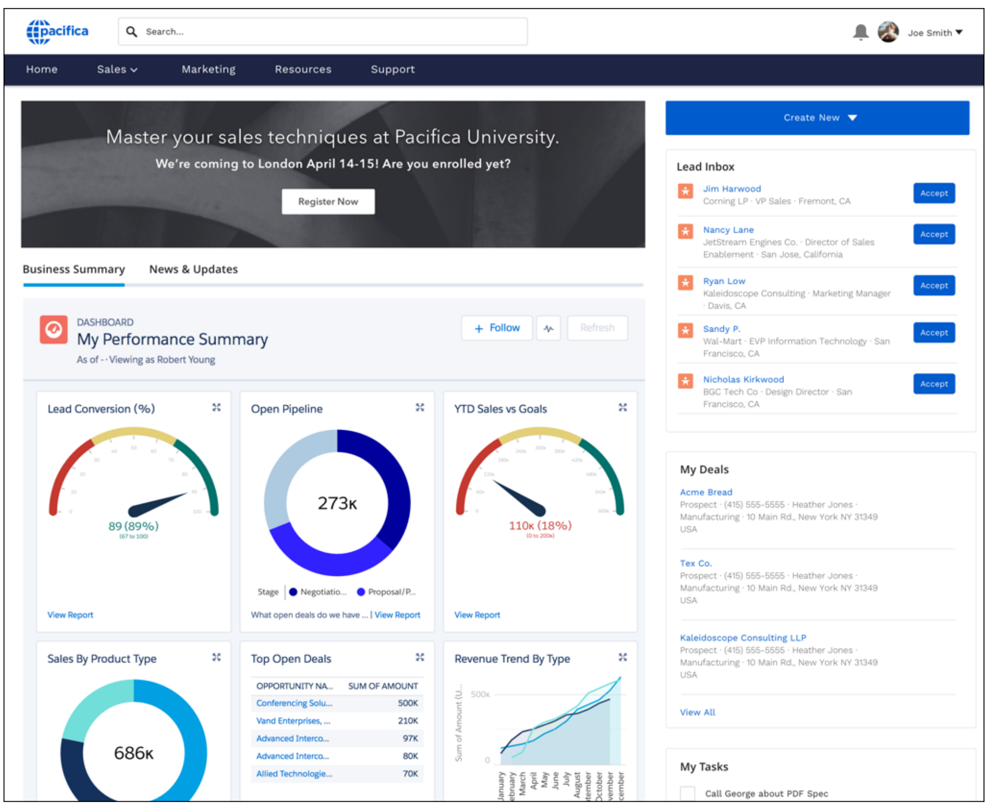
Partner Central in Action

Partner Central in Experience Workspaces

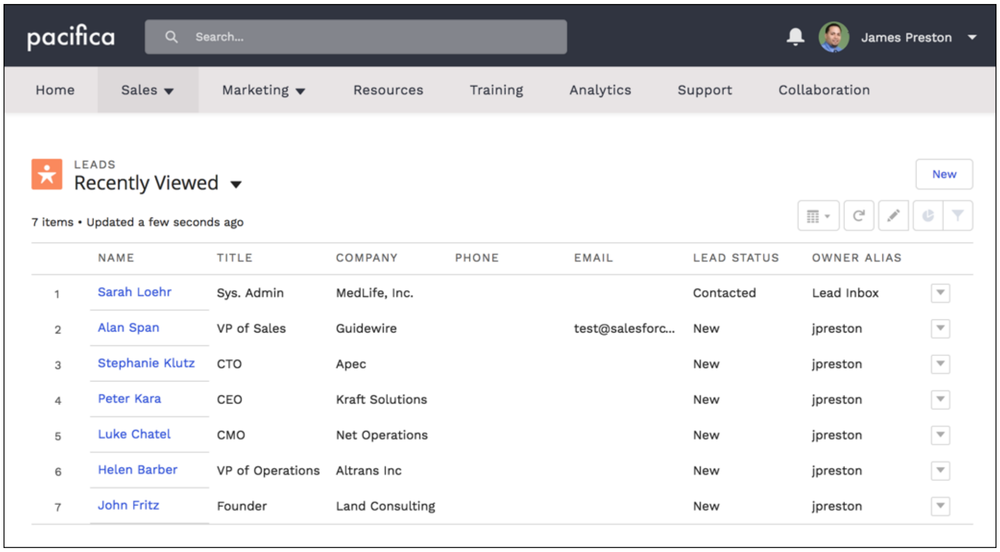


Partner Central Home Page

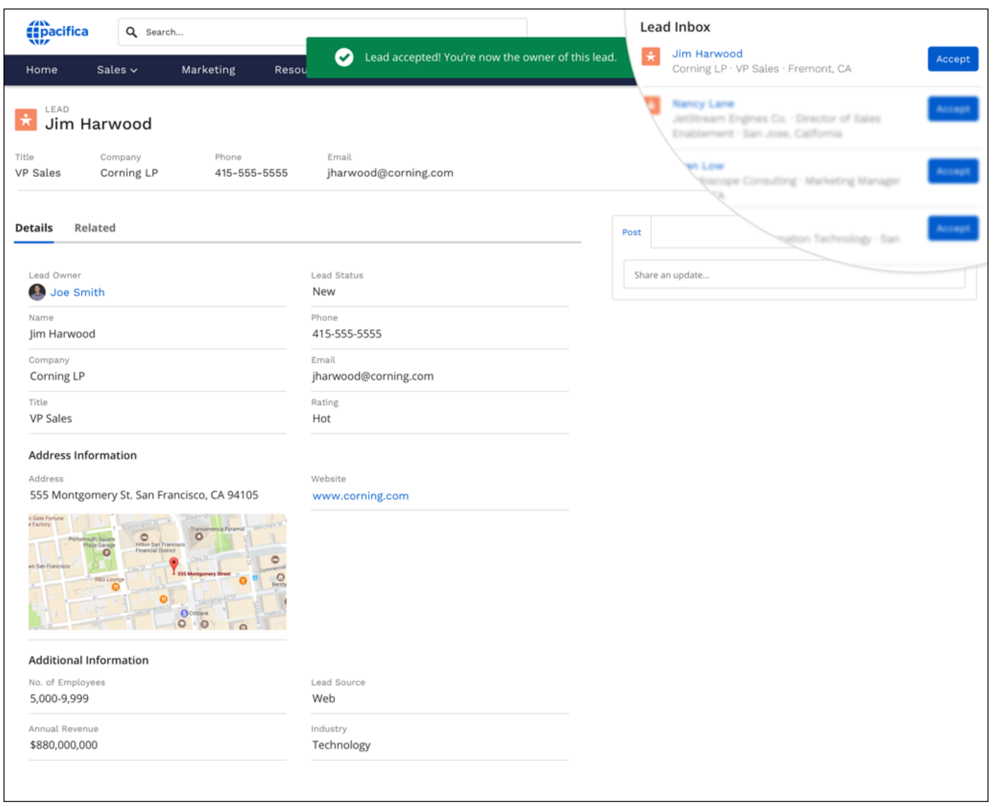
The Partner Central Home page includes lead inbox, global search, navigation menu, Quick Create menu, compact list views for deals and tasks, and reports and dashboards.



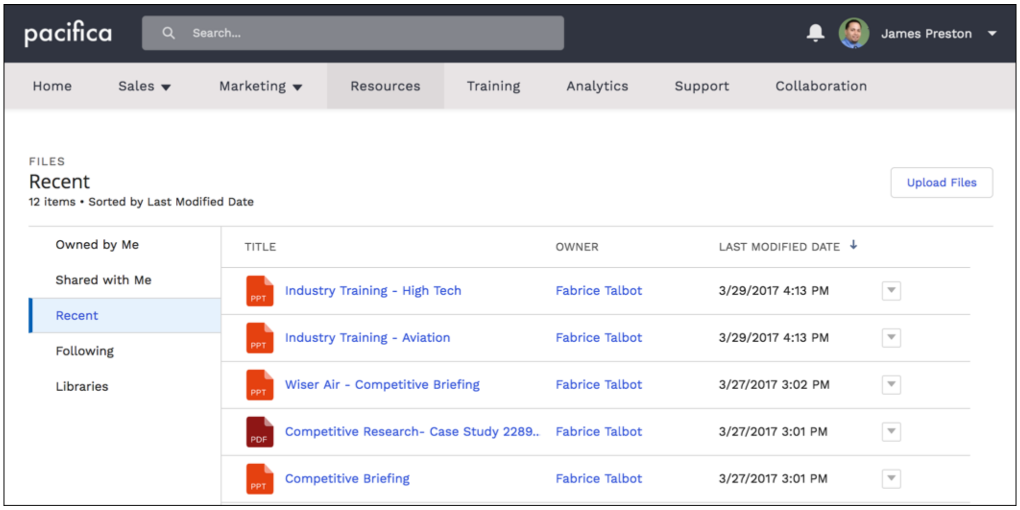
Leads List View



Lead Inbox and Lead Detail



Resources Page—Share Files and Libraries with Partners



The Customer Service Template

The Customer Service template provides a rich, self-service experience for your customers, where they can get answers to their questions at any time, on any device. With integrated knowledge articles and case management, customers can search for and view articles, post questions, or contact a support agent.

What You Get Out-of-the-Box

- Experience Builder pages and components
- Self-resolution of cases through knowledge and case creation
- Collaboration features such as groups, feeds, topics
- Global search with a customizable list of searchable objects
- Moderation rules to weed out trolls and bots
- Dashboards and reports
- Recommendations
- Customizable branding, design, and navigation
- Rich, responsive look and feel across multiple devices

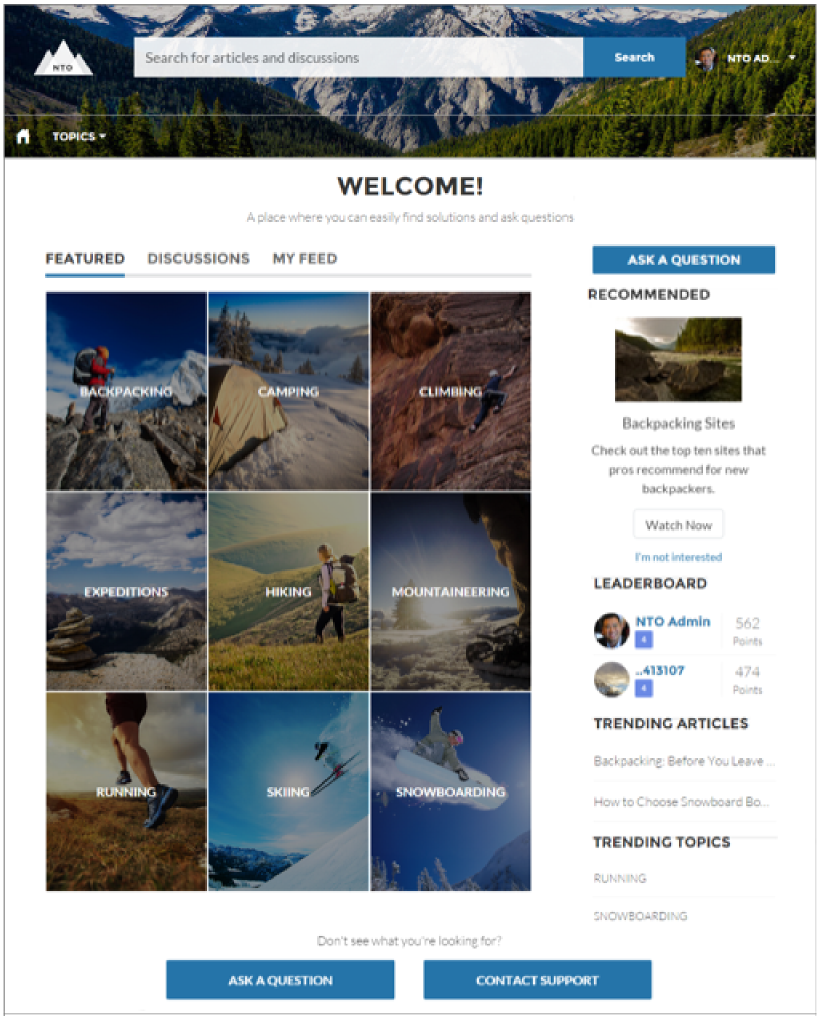
Advanced Features That You Can Configure

- Audience-targeting: Deliver custom content to partners by geography, tier, or other criteria.
- Google Analytics™: Track site activity with Google Analytics.
- Prebuilt and custom components: Check out the full list of compatible components you can use to build out your site.

Customer Support in Action

Customer Service Home Page

The Customer Service Home page includes featured topics and feeds, a leaderboard, recommendations, trending articles and topics, and support options. In addition, every page in the Customer Service template includes the template header, which provides global search, a profile menu, and navigation.



Customers Can Find the Help They Need

The Customer Service template adds discussions and suggested articles to your support community. When customers type a question in the search text box, the results include articles and similar questions that are based on matches with the typed text. If the answer isn't in the results, they can get help by asking a question in the community. Experts discuss the issue and provide a solution. And if they decide to contact customer support, they're shown a list of suggested articles based on keywords from the case subject and description. So there's an excellent chance they can find an answer without needing to create a support case.

Both guest users and logged-in users can access articles, search and view discussions, and contact agents through official support channels. When they log in to the site, they're also able to ask questions and participate in discussions in the feed. Members can answer questions in the community, just like commenting on a post in Chatter. And when a best answer is found, it's prominently displayed in the feed, allowing other users to quickly and easily find the answer.

Enhanced Profile and Navigation Experience

The Customer Service template has an enhanced profile and navigation experience for logged-in users. From the profile menu, users can quickly access their profile details, Chatter feed and list of cases, and contact customer support. Users with permissions to create or manage the site can also access management and setup pages directly from the profile menu. Users can edit their contact information and profile photo directly from their profile details. They can view statistics, such as how many posts and comments they've made and how many people they're following and are following them. User profiles also show user nicknames and reputation levels if they're enabled in the site.

Improved Organization with Topics

Topics help you structure a site to quickly guide members to the information that matters most. Choose navigational topics to provide an easy way for customers to explore, and featured topics to highlight current conversations and issues. Trending topics and related topics let members find active discussions and popular content. Member-created topics, meanwhile, let users organize information for each other, creating a personalized experience that boosts engagement. When setting up a site, you associate topics with existing data categories, so your articles appear in the appropriate topics.

Note: While the Customer Service template uses topics to display articles and questions, Knowledge articles are associated with data categories when they're created. To ensure that articles appear in the site, set data category visibility at the profile level for each category you associate with a topic. For instructions on setting default data category visibility, see Modify Default Data Category Visibility.

Included Pages

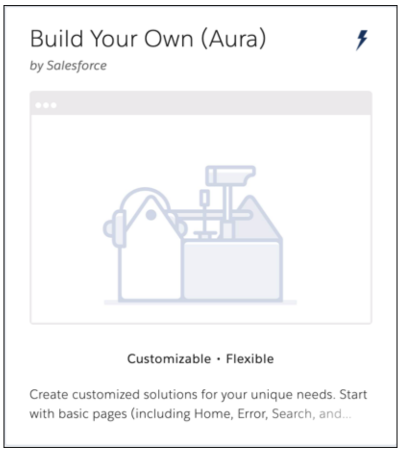
The Customer Service template includes the following pages.

- Home
- Account Management
- Article Detail
- Case
- Contact Support
- Create Record
- Dashboard
- Error
- Feed Detail
- File
- Flow
- Generic
- Group
- Login
- Messages
- My Account
- Question Detail
- Quip Doc Related List
- Report
- Report Builder
- Search
- Stream
- Top Articles
- Topic Catalog
- Topic Detail
- User Settings

- User

The Build Your Own Template (Aura)

The Build Your Own template provides the basic pages every Experience Builder site needs: Home, Create Record, Error, Record Detail, Record List, Related Record List, Search, Check Password, Forgot Password, Login, Login Error, and Register. And you can easily add more pages and components as needed for the experience you're building. Customize your branding and themes to refine the look of your site.



What You Get Out-of-the-Box

- Experience Builder pages and components
- Customizable branding and design

Advanced Features That You Can Configure

- Audience-targeting: Deliver custom content to partners by geography, tier, or other criteria.
- Google Analytics™: Track site activity with Google Analytics.
- Prebuilt and custom Lightning components: Check out the full list of compatible Lightning components you can use to build out your site.

Add Pages and Components

To view all components in the Components panel, select **Settings** > **Advanced** and click **Show All Components** in the Components Panel area. Some page functions require that you create a page in builder.

SEE ALSO:

Create Custom Pages with Experience Builder

The Build Your Own Template (LWR)

Use the Build Your Own (LWR) template for Experience Cloud to create blazing-fast digital experiences, such as websites, microsites, and portals, using the Lightning Web Components programming model. Powered by Lightning Web Runtime (LWR), this customizable template delivers unparalleled site performance.

Lightning Web Components uses core web components standards and provides only what's necessary to perform well in browsers supported by Salesforce. Because the components are built on code that runs natively in browsers, they're lightweight and efficient.

The template's performance features, such as publish-time freezing and HTTP caching, help you build richer experiences to target B2B and B2C markets.

IN THIS SECTION:

Standard Components for Use in the Build Your Own (LWR) Template

Standard components are built by Salesforce. Several are available when building sites with the Build Your Own (LWR) template, which is powered by Lightning Web Runtime.

EDITIONS

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

You must have at least one active community license in your org to use this feature.

HTML Editor

Use the HTML Editor component to create and edit custom content in HTML. In organizations with at least one active community license, this component can use data binding to dynamically populate content from Salesforce CMS and other data sources on record and CMS detail pages.

Rich Content Editor

Use the Rich Content Editor component to add formatted custom text to your site pages, along with images and videos. In orgs with at least one active community license, this component can use data binding to dynamically populate content from Salesforce CMS and other data sources on record and CMS detail pages.

Note: Branding changes that you make using the Themes tab and branding design tokens don't apply to the Rich Content Editor component.

Tile Menu

Use the Tile Menu Lightning Web component in Experience Builder to add an intuitive and visually stunning navigation experience to your site.

Orgs that have at least one active community license also have the following components.

Banner

Create a banner layout on your site using images, text, and buttons. Use data binding in this component to dynamically populate content from Salesforce CMS and other data sources.

Button

Use buttons as calls to action, linking to external pages or pages in your site. Nest the Button component inside other components, such as Banner and Tile, to add calls to action in any region of the page.

Horizontal Line

Add a horizontal line to visually separate elements on the page. Choose the line's weight, width, and style.

Image

Use the image component to add images to your page. Add the image URL and alt text for screen readers. This component can dynamically populate content from Salesforce CMS and other data sources when used on CMS or record detail pages.

Text Block

Add text to the page. Text formatting, such as heading tags and font sizes, are inherited from the overall branding settings of the site.

Tile

Create a tile layout on your site using images, text, and buttons. Use data binding in this component to dynamically populate content from Salesforce CMS and other data sources.

Video

Use the Video component to add images to your page. Add the video embed URL and settings, such as aspect ratio, width, and horizontal alignment. Use data binding in this component to dynamically populate content from Salesforce CMS and other data sources.

Dynamically Add Content to Your LWR Sites with Data Binding

EDITIONS

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

You must have at least one active community license in your org to use this feature.

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

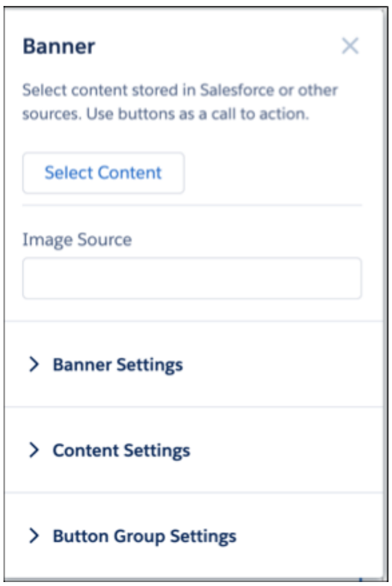
  OR

- Be a member of the site AND an experience admin, publisher, or builder in that site

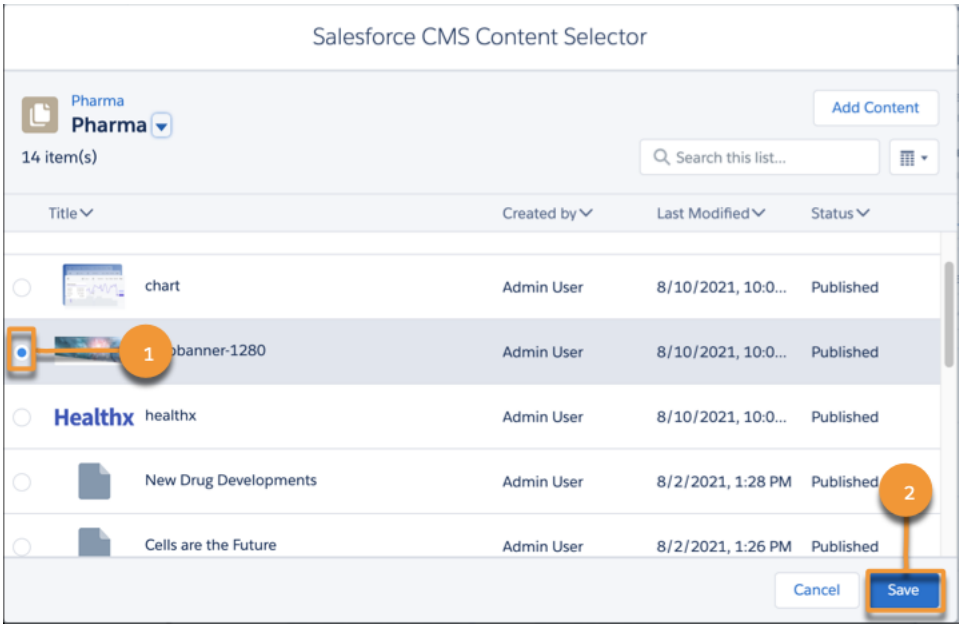
By using data binding, you can select content to dynamically populate your LWR sites. You can create content that matches your branding and messaging, save it in your Salesforce CMS, and then use the content on any Lightning Web Runtime (LWR) site. You can also nest components within one another. The nested component inherits content from the parent component.

Note: Although the Text Block, HTML Editor, Image, Video, and Button components don't support direct data binding on the Home page, they're data-bound when you use them on detail pages. Moreover, you can nest them in other data-bound components. On detail pages and as nested components, they inherit content from the data-bound component in which they're nested.

1. Drag a component that supports data binding on the Home page.
2. Click **Select Content** in the Banner or Tile components.



3. Select the content that you want (1) and save (2).



4. Map the fields in the component to the ones from the data source.
5. Adjust settings as needed.

Bind Data to CMS and CRM Record Detail Pages

EDITIONS

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

You must have at least one active community license in your org to use this feature.

USER PERMISSIONS

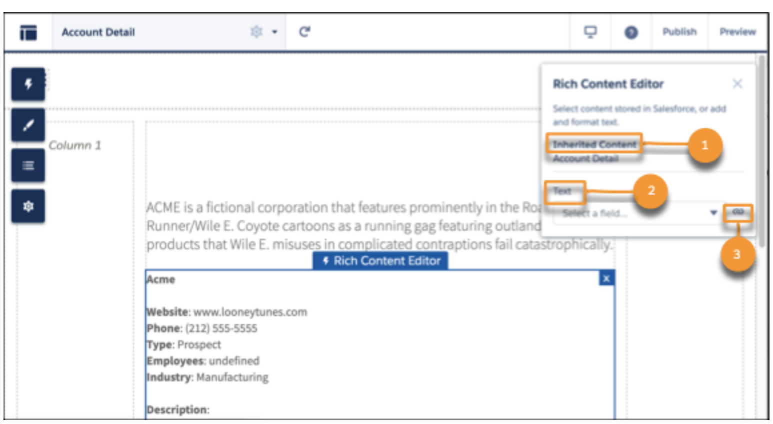
To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR
- Be a member of the site AND an experience admin, publisher, or builder in that site

Data-bound components used on CMS and CRM record detail pages can automatically populate with content saved in Salesforce CMS and records. Map fields in the component property editor to fields in CMS and records.

1. Drag a component that supports data binding on a detail page (such as Record Detail or News Detail). In the property panel, note that you already have content inherited from the detail pages saved in Salesforce (1).



2. Map the fields in the property panel to fields in the record or CMS detail (2). You can bind data from any field on the detail page, including custom fields. The content then populates automatically in the component.

1. If you want to use a component on a detail page but not bind content, click the chain link icon next to the data source (3) to unlink the content. Paste in a valid URL in the field instead to link to static content.
3. Adjust settings as needed.

The Microsite Template

The Microsite template is the foundation for your small, special-purpose websites. Microsites are often used by companies that already have a full site but want a dedicated space for a single communication or conversion goal. Microsites work well to host an idea or product that requires more content than a single landing page. Built on the Lightning Web Runtime (LWR) platform, the template includes responsive layout and content components that you can use to quickly spin up a landing page, event site, or other web experience. Capture visitor information and send it directly to the Lead object with the Lead Form component.

Included Features

- Experience Builder example design and components
- Ability to route lead information directly to the Leads object
- Access to the LWR framework
- Direct connection to Salesforce CMS to pull in CMS content

Advanced Features That You Can Configure

- Pre-built and custom components. Check out the full list of compatible components you can use to build out your LWR site at Standard Components for Use in the Build Your Own (LWR) Template on page 252.
- A quick start repository with sample component code. Use the example code to create and customize your own components. To access the repository, see Experience Cloud Microsite Samples.

Microsite Use Case

When your company is hosting an event, you need a place to keep all your event information that doesn't necessarily live with your other content. Enter microsites. Publish your page with all the event information, pull in logos and other content that you created in CMS, and archive the page when the event is over.

When you want to promote a specific product or opportunity, consider using a microsite to host your content. You can choose to associate the URL with your full company website, or create a new, dedicated domain.

Included Components

The Microsite template includes these components.

- Lead Form
- Header
- Banner
- Tile
- Image
- Video
- Text
- Button

- Horizontal Line
- Tile Menu
- Rich Text Editor
- HTML Editor

IN THIS SECTION:

Create Special Purpose Websites with Microsites

Microsites are useful for everything from event pages to lightweight websites. Using the Microsite template, you can create a site with built-in navigation and layout components that are responsive and easy to customize.

EDITIONS

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

Before You Begin

Microsites are high-performance websites often designed for specific opportunities and singular use cases. Before you start designing your microsite, we recommend that you keep these things in mind.

- The Microsite template offers limited support for standard components. For a list of supported components, see Which Components Can I Use with Each Aura Template? on page 269
- To achieve the best possible performance at scale, we recommend serving microsites from a content delivery network (CDN). For more information about the Experience Cloud CDN, see Experience Cloud Content Delivery Networks (CDN) Overview on page 598.

IN THIS SECTION:

Create a Microsite

Create your microsite using the Microsite template and customize the existing components to fit your company needs. Microsites run on the Lightning Web Runtime (LWR) platform so you can create beautiful, efficient websites.

1. From **Setup**, in the Quick Find box, enter `Experiences`, and then under **Digital Experiences**, select **All Sites**.

   Note: If you're just getting started with Experience Cloud and you've never created a site, see Set Up an Experience Cloud Site.

2. Select **New**.
3. Choose the Microsite template and click **Get Started**.
4. Name your microsite and provide a URL.

   Note: You can associate the URL with your primary website URL, or create an entirely separate URL.

5. Choose whether you want Unauthenticated or Authenticated access.

   Note: To use the Lead Form component to capture leads and store them in Salesforce as Lead records, guest users must have access to your site. If you plan on using this functionality, we suggest that you choose the unauthenticated access option. For more information on giving guest users access to your site, see Give Secure Access to Unauthenticated Users with the Guest User Profile.

6. Click **Create**.

EDITIONS

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

USER PERMISSIONS

To create an Experience Cloud site:

- Create and Set Up Experiences AND View Setup and Configuration

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

Configure Microsite Layout and Create Navigation

The Header component, included with the Microsite template, includes theme settings and built-in navigation.

1. To customize the header, select the **Theme** menu.
2. Select **Theme Settings**.

   Show fixed header displays the Fixed Header component, which remains fixed at the top of the screen when your users scroll. You can also choose to fix the primary header by selecting **Fix theme header**, which gives your users access to the menu and navigation as they scroll.
3. Choose which headers to show and then select the component to configure the display.
4. To add navigation to the Header component, select the **Settings** menu.
5. Choose **Navigation** and select **Add Navigation Menu**.
6. From the Menu Editor dialog you can create menu items and choose where to link to. Drag and drop your items and choose how to display them by selecting the Header component.

SEE ALSO:

Developer Documentation: Create Components for LWR Sites

Developer Documentation: Create Custom Layout Components

EDITIONS

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

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR
- Be a member of the site AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR
- Be a member of the site AND an experience admin or publisher in that site

Send Visitor Information to the Salesforce Lead Object

Use the Lead Form component in the Microsite template to capture visitor information in your site and create a new Lead record in Salesforce.

1. To allow your site to access the proper access to the Leads object, navigate to Workspaces and select the Administration tile.
2. Select **Preferences**.
3. Under **General**, select **Allow guest users to access public APIs** and click **Save**.
4. Navigate back to Experience Builder and select **Settings**.
5. Under **Guest User Profile**, select the link with your site name.
6. From the example profile, select **Edit**.
7. Under **Standard Object Permissions**, select **Read** and **Create** next to the Leads object.
8. Click **Save**.
9. Under **Field Level Security**, select a field and allow access to the fields you intend to capture.
10. Save your work.

EDITIONS

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

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

Capture Visitor Information with the Lead Form Component

After you finish setting up your Guest User profile and configuring the correct object access, navigate to Experience Builder to configure the Lead Form component.

1. From your Experience Builder canvas, select the Lead Form component.
2. Decide which fields you want displayed on your form.

   Note: There are several required fields on the Lead object, including Last Name and Company. If you don't want to display these fields on your form, uncheck **Show field** and enter a default value.

3. Choose to display standard fields, like Last Name, and add other Lead fields using the Custom Field sections.
4. To gather information from the form without displaying the field, use a custom field and under **Select an Input Type**, choose **Hidden**.

   Note: We strongly recommend that you avoid collecting and storing sensitive information in a hidden field. It's possible for users to intercept and potentially change field information during data transfer.

Limitations and Behavior

- The **Show Field** option determines whether a field displays on, and collects information from, the form. In contrast, hidden fields allow you to hide a field but still capture data. If you select **Hidden**, the form ignores **Show field** and hides the field.
- Hidden fields capture the default value, unless you map to a standard field that exists on the form, such as Email. If you map to an existing field with a hidden field and another standard field, the visitor entered data is collected and the default value is ignored.
- If multiple custom fields map to the same field on the Lead object, the last field collected is the field that is stored in the record. To avoid confusion, we recommend mapping each custom field to a unique field on the Lead object.
- Certain default values require specific formatting. If you plan to map a custom field to a date, dateTime, multiple picklists, or reference field, use these formatting instructions.
  - Date: *2020-09-07*
  - DateTime: *2020-09-07T00:00:00Z*
  - MultiplePicklist: *A;B;C*
  - Reference: Valid ID

EDITIONS

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

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

Objects Supported by Out-of-the-Box Components and Pages in Experience Builder Templates

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

When we talk about supported objects in templates, we mean that you can use our out-of-the-box components on the object pages, as detailed here.

API names are indicated in parentheses.

	• **Headline** • **Record Banner** • **Record Detail** • **Record Information Tabs** • **Related Records**	• **Navigation Menu** • **Object Home Page**	• **Create Record Button** • **Create Record Form**
Account (Account)	✓	✓	✓
Activity History (ActivityHistory)	✓		
Address (Address)	✓		
Approval History (ProcessInstanceHistory)	✓		
Approval Process Work Item (ProcessInstanceWorkItem)	✓		
Approval Step (ProcessInstanceStep)	✓		
Asset (Asset)	✓	✓	✓
Asset Relationship (Asset Relationship)	✓		
Assigned Resource (AssignedResource)	✓		
Associated Location (AssociatedLocation)	✓		
Calendar (Calendar)	✓		
Campaign (Campaign)	✓	✓	✓
Campaign Member (CampaignMember)	✓	✓	
Case (Case)	✓	✓	✓
Channel Program (ChannelProgram)	✓	✓	
Channel Program Level (ChannelProgramLevel)	✓	✓	
Channel Program Member (ChannelProgramMember)	✓		
Contact (Contact)	✓	✓	✓
Contract (Contract)	✓	✓	✓
Custom Objects	✓	✓	✓

	• **Headline** • **Record Banner** • **Record Detail** • **Record Information Tabs** • **Related Records**	• **Navigation Menu** • **Object Home Page**	• **Create Record Button** • **Create Record Form**
Dashboard (Dashboard)	✓	✓	
Email Message (EmailMessage)	✓		
Event (Event)	✓		✓
External Objects	✓	✓	✓
Group (CollaborationGroup)	✓	✓	✓
Lead (Lead)	✓	✓	✓
List Email (ListEmail)	✓	✓	✓
Location (Location)	✓	✓	✓
Maintenance Asset (MaintenanceAsset)	✓		
Maintenance Plan (MaintenancePlan)	✓	✓	✓
Note (Note and NoteAndAttachment)	✓		✓
Open Activity (OpenActivity)	✓		
Operating Hours (OperatingHours)	✓	✓	✓
Opportunity (Opportunity)	✓	✓	✓
Opportunity Contact Role (OpportunityContactRole)	✓		
Opportunity Product (OpportunityLineItem)	✓		
Opportunity Team Member (OpportunityTeamMember)	✓		
Order (Order)	✓	✓	✓
Partner Fund Allocation (PartnerFundAllocation)	✓	✓	
Partner Fund Claim (PartnerFundClaim)	✓	✓	

	• **Headline** • **Record Banner** • **Record Detail** • **Record Information Tabs** • **Related Records**	• **Navigation Menu** • **Object Home Page**	• **Create Record Button** • **Create Record Form**
Partner Fund Request (PartnerFundRequest)	✓	✓	
Partner Marketing Budget (PartnerMarketingBudget)	✓	✓	
Price Book (Pricebook2)	✓	✓	
Price Book Entry (PricebookEntry)	✓		
Product (Product2)	✓	✓	
Product Consumed (ProductConsumed)	✓		
Product Item (ProductItem)	✓	✓	✓
Product Item Transaction (ProductItemTransaction)	✓		
Product Request (ProductRequest)	✓	✓	✓
Product Request Line Item (ProductRequestLineItem)	✓	✓	✓
Product Required (ProductRequired)	✓		
Product Transfer (ProductTransfer)	✓	✓	✓
Quote (Quote)	✓	✓	
Quote Line Item (QuoteLineItem)	✓		
Report (Report)	✓	✓	
Resource Absence (ResourceAbsence)	✓		
Resource Preference (ResourcePreference)	✓		
Return Order (ReturnOrder)	✓	✓	✓

	• **Headline** • **Record Banner** • **Record Detail** • **Record Information Tabs** • **Related Records**	• **Navigation Menu** • **Object Home Page**	• **Create Record Button** • **Create Record Form**
Return Order Line Item (ReturnOrderLineItem)	✓		
Service Appointment (ServiceAppointments)	✓		
Service Contract (ServiceContract)	✓	✓	✓
Service Contract Line Item (ServiceContractLineItem)	✓		
Service Crew (ServiceCrew)	✓	✓	✓
Service Crew Member (ServiceCrewMember)	✓	✓	✓
Service Report (ServiceReport)	✓		
Service Resource (ServiceResource)	✓	✓	✓
Service Resource Capacity (ServiceResourceCapacity)	✓		
Service Resource Skill (ServiceResourceSkill)	✓		
Service Territory (ServiceTerritory)	✓	✓	✓
Service Territory Location (ServiceTerritoryLocation)	✓		
Service Territory Member (ServiceTerritoryMember)	✓		
Shipment (Shipment)	✓	✓	✓
Skill Requirement (SkillRequirement)	✓		
Shared Contacts (AccountContactRelationship)	✓		
Task (Task)	✓	✓	✓
Time Sheet (TimeSheet)	✓	✓	✓

	• **Headline** • **Record Banner** • **Record Detail** • **Record Information Tabs** • **Related Records**	• **Navigation Menu** • **Object Home Page**	• **Create Record Button** • **Create Record Form**
Time Sheet Entry (TimeSheetEntry)	✓		
Time Slot (TimeSlot)	✓		
User (User)	✓		
Work Order (WorkOrder)	✓	✓	✓
Work Order Line Item (WorkOrderLineItem)	✓		
Work Type (WorkType)	✓	✓	✓

Note: To be searchable in Experience Cloud sites, objects must be searchable in Lightning Experience and supported in templates.

Customer Service Experience Builder Template Setup Checklist

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

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

Have you considered everything on these lists?

Before You Begin:

Gather your branding assets:

☐ High-resolution image of your company logo

☐ Color scheme (or an image to upload to automatically generate one)

☐ Image to use as a header

☐ Thumbnail images (385x385 pixels), if you're using Featured Topics

In your internal Salesforce org:

☐ Enable Digital Experiences. Choose a unique URL that works for your business, because you can't change it after it's been set.

☐ Set up email templates for any communication between the community and its members (welcome email, resetting password email, and so on).

☐ Enable any Service Cloud features you plan to use in the community, such as Salesforce Knowledge and Embedded Chat.

☐ Review profiles and add permission sets as needed.

- [ ] Set up Web-to-Case.

If you're using Salesforce Knowledge:

- [ ] Review your data categories.
- [ ] Enable feed tracking for your Knowledge article types.

As You're Making Your Site:

In your internal Salesforce org:

- [ ] Add members.

Configure the Guest User Profile (access using Experience Builder):

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

In Experience Workspaces:

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

In Experience Builder:

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

After Making Your Site

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

Migrate a Koa or Kokua Site to a New Template

The Koa and Kokua templates are in phased retirement, and you can no longer use them to create site. Salesforce supports existing sites built with Koa and Kokua, but we recommend migrating to newer templates. The new templates provide richer support for Salesforce Knowledge and case management, and they also receive updates and new features with each release.

Migration Options

Because your Koa and Kokua sites aren't using the latest Lightning technology, we recommend creating a new site. A new site reflects the most recent innovations and features.

You can choose to migrate your site using the **Change Template** button from **Workspaces** > **Administration**. If you do, the migrated version won't reflect all the innovations made to the product.

To determine which template is right for your use case, check out Which Experience Cloud Template Should I Use?. Also think about what you envision for the future. If your use case is strictly a help forum, consider using the Help Center template. Otherwise, consider the Customer Account Portal as an option.

Note: Always test your implementation first in a sandbox before publishing your new site. See Deploy an Experience Cloud Site from Sandbox to Production.

Your Koa or Kokua site allows you to expose your Salesforce Knowledge implementation to the world while giving users the chance to file cases. The Customer Service template lets you do both. But it also lets you do other things, such as add Chat capabilities or the potential for customers to edit their cases. If the Customer Service template's extra features are more than you need, you can remove unnecessary pages and components.

Filtering in Searches

Koa and Kokua searches allow users to filter by article type and category. These filtering options are only available in the Koa and Kokua templates. However, you can scope searches to specific topics and see all articles associated with that topic. You can also look for search components created by trusted Salesforce partners and distributed via AppExchange.

Data Categories Versus Topics

Your Koa or Koa site uses your Salesforce Knowledge setup and data categories to organize content. The Customer Service template also uses Salesforce Knowledge in the back end to organize content, but in the site, content is organized using topics. You can map the articles in your data categories to topics in a site.

To map articles to topics automatically:

1. Select **Experience Workspaces** > **Content Targeting** > **Automatic Topic Assignment**.
2. Enable **Automatic Topic Assignment**.
3. Map topics to data category groups and data categories. You can choose to add the topics to all existing articles and articles added in the future.

Because data categories aren't the primary content organization scheme in the Customer Service template, you can't use the following components.

- Article Type Filter
- Category Filter
- Category Navigation
- Expanded Category Navigation
- Featured Data Categories
- Featured Search
- Trending Articles

You can map your exact hierarchy from data categories to topics, up to eight levels of depth.

Data Category Permissions

Thoroughly check the data category permissions for all profiles accessing your newly built site. If you add new profiles and users to your site, check that all the articles' data categories are set to the right permissions for your users. In particular, check the permission on the guest user profile for each site.

Viewing Articles

The Article Listview and Article Home components are only supported in the Koa and Kokua templates. Use the Top Articles by Topic component for a list view in a Customer Service community. When you click a topic in the Top Articles by Topic component, you see the topic detail page with a list of articles for that topic.

Left-Hand Navigation

Use custom themes to replicate the left-hand navigation scheme seen in the Koa and Kokua templates.

New URL

Your new site's URL is different from your old Koa or Kokua URL. Give your customers a smooth transition from one to the next by following these steps.

1. In your Koa or Kokua site, select **Workspaces** > **Administration**.
2. Click the pencil button, and change the site's URL.
3. Click **Save**.
4. In your new site, select **Workspaces** > **Administration**.
5. Click the pencil button, and change the community's URL so that it matches your old URL.
6. To handle bookmarked articles, consider rewriting your site URLs.

Important: Change the URL only after testing that your new site works just as you want it to.

Which Components Can I Use with Each Aura Template?

Aura site templates, such as Customer Service and Partner Central, are each composed of pages, which in turn are made up of customizable components. Consult this table to find out which Aura template each component can be used in, and when the component became available.

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

Sites built with Salesforce Tabs + Visualforce don't use Lightning components.

Note: As part of their phased retirement, from Summer '17, you can no longer use the Koa and Kokua templates. Salesforce still supports existing Experience Builder sites that were built using Koa and Kokua. To create a site based on Koa or Kokua, contact Salesforce Support. However, we recommend that you work with Salesforce Support on a plan to replace your existing Koa and Kokua sites. The latest Experience Builder templates provide richer support for Knowledge and case management.

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Component	Customer Service and Lightning Bolt Solutions	Partner Central	Customer Account Portal	Help Center	Build Your Own (Aura)	Available in Versions
Account Brand Details		✓	✓		✓	Summer '19 and later
Activities	✓	✓	✓		✓	
Announcement Section	✓	✓	✓		✓	Winter '16 and later
Article Content	✓	✓	✓		✓	All versions
Articles with This Topic	✓	✓	✓	✓	✓	
Ask Button	✓	✓			✓	All versions

Component	Customer Service and Lightning Bolt Solutions	Partner Central	Customer Account Portal	Help Center	Build Your Own (Aura)	Available in Versions
Breadcrumb	✓	✓	✓	✓	✓	All versions
Calendar				✓	✓	
Campaign Marketplace	✓	✓	✓	✓	✓	All versions
Case Attachments	✓					Before Summer '17[1]
Case Banner	✓				✓	Before Summer '17[1]
Case Comments	✓				✓	Before Summer '17[1]
Case Comments Publisher	✓				✓	All versions
Case Deflection	✓	✓	✓	✓	✓	Spring '18 and later
Case Detail	✓				✓	Before Summer '17[1]
Case Feed	✓				✓	From Summer '15 until Summer '17[1]
Case Feed Publisher	✓				✓	From Summer '15 until Summer '17[1]
Case List	✓				✓	Before Summer '17[1]
CMS Collection	✓	✓	✓	✓	✓	Winter '19 and later
CMS Connect (HTML)	✓	✓	✓	✓	✓	All versions
CMS Connect (JSON)	✓	✓	✓	✓	✓	All versions
CMS Single Item on page 310	✓	✓	✓	✓	✓	Winter '19 and later

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

Component	Customer Service and Lightning Bolt Solutions	Partner Central	Customer Account Portal	Help Center	Build Your Own (Aura)	Available in Versions
CMS Single Item (Detail) on page 311	✓	✓	✓	✓	✓	Winter '19 and later
Calendar	✓	✓	✓		✓	All versions
Contact Request Button & Flow	✓	✓	✓		✓	Spring '19 and later
Contact Support Button	✓	✓	✓	✓	✓	All versions
Contact Support & Ask Buttons[2]	✓				✓	Winter '16 and later
Contact Support Form	✓	✓	✓	✓	✓	Spring '18 and later
Create Case Form	✓	✓	✓		✓	All versions
Create Record Button	✓	✓	✓		✓	Winter '16 and later
Create Record Form	✓	✓	✓		✓	Winter '16 and later
Custom Lightning Components	✓	✓	✓	✓	✓	Winter '16 and later
Customizable User Settings	✓	✓	✓		✓	Summer '19 and later
Dashboard	✓	✓	✓		✓	Winter '16 and later
Dashboard List	✓	✓	✓		✓	Winter '16 and later
Deflection Tracking	✓ *	✓ †	✓ †	✓ †	✓ *	* Spring '19 and later † Summer '19 and later
Tableau CRM Dashboard	✓	✓	✓		✓	Summer '17 and later
Einstein Predictions	✓	✓	✓		✓	Winter '20 and later

[2] Contact Support is included as part of the Contact Support & Ask Buttons component.

Component	Customer Service and Lightning Bolt Solutions	Partner Central	Customer Account Portal	Help Center	Build Your Own (Aura)	Available in Versions
Engagement	✓		✓			Winter '17 and later
Featured Topics	✓	✓		✓	✓	Winter '16 and later
Featured Topics & Feeds	✓				✓	All versions
Feed	✓	✓	✓		✓	Winter '16 and later
Feed Compact	✓	✓	✓		✓	Winter '16 and later
Feed History	✓	✓	✓		✓	Winter '17 and later
Feed Post & Comments	✓	✓	✓		✓	Summer '15 and later
Feed Publisher	✓	✓	✓		✓	Winter '16 and later
Files List	✓	✓	✓	✓	✓	Winter '16 and later
Flow	✓	✓	✓	✓	✓	Winter '18 and later
Follow Button	✓	✓			✓	Summer '15 and later
Global Search Box	✓	✓	✓		✓	All versions
Global Search for Peer-to-Peer Communities	✓					Winter '18 and later
Global Search Results	✓	✓	✓	✓	✓	All versions
Group	✓	✓	✓		✓	Winter '16 and later
Group Banner	✓	✓	✓		✓	Winter '16 and later
Group Detail	✓	✓	✓		✓	Winter '16 and later

Component	Customer Service and Lightning Bolt Solutions	Partner Central	Customer Account Portal	Help Center	Build Your Own (Aura)	Available in Versions
Group Related List	✓	✓	✓		✓	Winter '16 and later
Headline	✓	✓		✓	✓	All versions
HTML Editor	✓	✓	✓	✓	✓	All versions
Event Insights	✓	✓	✓	✓		Winter '19 and later
Knowledgeable People	✓	✓			✓	Summer '15 and later
Language Selector	✓	✓	✓	✓	✓	Winter '16 and later
Lead Inbox	✓	✓	✓		✓	Summer '17 and later
Libraries	✓	✓	✓	✓	✓	Winter '18 and later
Manage Members Section	✓	✓	✓		✓	Winter '16 and later
Member Profile and Settings	✓	✓	✓		✓	Winter '18 and later
Membership	✓	✓	✓		✓	Winter '17 and later
Message Notification	✓	✓			✓	Spring '17 and later
Navigation Bar	✓				✓	Before Winter '16
Navigation Menu	✓				✓	Before Winter '16
New Message Button	✓	✓			✓	Spring '17 and later
Path (Experience Builder Site Component)	✓	✓	✓		✓	Winter '16 and later
Paused Flows	✓	✓	✓		✓	All versions
Profile Header	✓	✓	✓		✓	Before Winter '18[3]

[3] User Profile Menu replaces Profile Header in Lightning templates based on Winter '18 and later versions of Lightning templates.

Component	Customer Service and Lightning Bolt Solutions	Partner Central	Customer Account Portal	Help Center	Build Your Own (Aura)	Available in Versions
Quip				✓		
Quip Docs Related List				✓		
Recognition Badges	✓	✓	✓	✓	✓	Winter '19 and later
Recommendations		✓			✓	Winter '18 and later
Recommendations Carousel	✓	✓	✓	✓	✓	Summer '15 and later
Record Banner	✓	✓	✓		✓	Winter '16 and later
Record Detail	✓	✓	✓		✓	Winter '16 and later
Record Information Tabs	✓	✓	✓	✓	✓	Winter '16 and later
Record List	✓	✓	✓		✓	Winter '16 and later
Record Related List	✓	✓	✓		✓	Winter '16 and later Spring '20 and later; in Help Center, a file is the only object that's supported.
Related Articles List	✓	✓	✓		✓	Summer '16 and later
Related List - Single	✓	✓	✓		✓	Winter '19 and later
Related Questions List	✓	✓			✓	Summer '16 and later
Related Record List	✓	✓	✓	✓ *	✓	Winter '16 and later
Related Topics List	✓	✓	✓		✓	Spring '15 and later

Component	Customer Service and Lightning Bolt Solutions	Partner Central	Customer Account Portal	Help Center	Build Your Own (Aura)	Available in Versions
Report Chart	✓	✓	✓		✓	Winter '16 and later
Report List	✓	✓	✓		✓	Winter '16 and later
Report Summary	✓	✓	✓		✓	Winter '16 and later
Reputation Leaderboard	✓	✓	✓		✓	Spring '15 and later
Rich Content Editor	✓	✓	✓	✓	✓	Winter '16 and later
Scroll To	✓				✓	All versions
Search & Post Publisher (Deprecated)	✓					Before Winter '18
Search Results	✓	✓	✓	✓	✓	All versions
Set Case Status Button	✓	✓			✓	All versions
Embedded Service	✓	✓	✓		✓	Summer '17 and later
Stream Detail	✓	✓	✓		✓	Winter '18 and later
Stream List	✓	✓	✓		✓	Winter '18 and later
Suggested Actions	✓	✓	✓	✓	✓	Spring '19 and later
Survey	✓	✓	✓		✓	Winter '18 and later
Tabs	✓	✓	✓	✓	✓	Winter '16 and later
Tile Menu	✓	✓	✓	✓	✓	All versions
Top Article by Topic	✓	✓	✓		✓	Winter '16 and later
Topic Catalog	✓	✓	✓	✓	✓	Spring '16 and later

Component	Customer Service and Lightning Bolt Solutions	Partner Central	Customer Account Portal	Help Center	Build Your Own (Aura)	Available in Versions
Topic Description	✓	✓			✓	Spring '16 and later
Topic Metrics	✓	✓	✓		✓	Winter '16 and later
Topics	✓	✓	✓		✓	Winter '19 and later
Totals	✓	✓	✓		✓	Winter '16 and later
Trending Articles by Topic	✓	✓	✓		✓	Winter '17 and later
Trending Topics	✓	✓	✓	✓	✓	Spring '15 and later
Unanswered Questions	✓	✓			✓	Winter '16 and later
User Profile	✓	✓	✓		✓	Spring '16 and later
User Profile Detail	✓	✓	✓		✓	Winter '16 only
User Profile Image	✓	✓	✓		✓	All versions
User Profile Knows About	✓	✓			✓	Winter '16 and later
User Profile Menu	✓	✓	✓		✓	Winter '18 and later[3]
User Profile Related List	✓	✓	✓		✓	Spring '16 and later
User Profile Stats	✓	✓			✓	Spring '15 and Summer '15
User Profile Summary	✓	✓	✓		✓	All versions
User Profile Summary & Image (Deprecated)	✓	✓	✓		✓	Spring '16 and later
User Profile Tabs	✓	✓			✓	Spring '15 and later

Component	Customer Service and Lightning Bolt Solutions	Partner Central	Customer Account Portal	Help Center	Build Your Own (Aura)	Available in Versions
User Settings (Deprecated)	✓	✓	✓		✓	Spring '15 and later
Visualforce Page Component	✓	✓	✓	✓	✓	Spring '17 and later

Login Components

Component	Available in Versions
Employee Login Link	All versions
Forgot Password	All versions
Login Form	All versions
Self-Registration	All versions
Social Login	All versions

SEE ALSO:

B2B Commerce on Lightning Experience Components

Getting Started with the Aloha Community Template for Salesforce Identity

Components for Use with the Koa and Kokua Templates

Find out which components you can use with the Koa and Kokua self-service templates.

Note: As part of their phased retirement, from Summer '17, you can no longer use the Koa and Kokua templates. Salesforce still supports existing Experience Builder sites that were built using Koa and Kokua. To create a site based on Koa or Kokua, contact Salesforce Support. However, we recommend that you work with Salesforce Support on a plan to replace your existing Koa and Kokua sites. The latest Experience Builder templates provide richer support for Knowledge and case management.

Component	Koa	Kokua	Available in Versions
Article List	✓	✓	All versions
Article Type Filter	✓	✓	All versions
Article Content	✓	✓	All versions
Back Button	✓	✓	Spring '15 and earlier
Case Attachments	✓	✓	All versions
Case Banner	✓	✓	All versions

Component	Koa	Kokua	Available in Versions
Case Comments	✓	✓	All versions
Case Comments Publisher	✓	✓	All versions
Case Detail	✓	✓	All versions
Case Feed	✓	✓	Summer '15 and later
Case Feed Publisher	✓	✓	Summer '15 and later
Case List	✓	✓	All versions
Category Filter	✓	✓	All versions
Category Navigation	✓	✓	All versions
Contact Support & Ask Buttons	✓	✓	All versions
Create Case Form	✓	✓	All versions
Expanded Category Navigation	✓	✓	All versions
Featured Data Categories	✓	✓	All versions
Featured Search	✓	✓	All versions
Feed Post & Comments	✓	✓	Summer '15 and later
HTML Editor	✓	✓	All versions
Language Selector	✓	✓	Winter '16 and later
Profile Header	✓	✓	All versions
Rich Content Editor	✓	✓	Winter '16 and later
Search	✓	✓	All versions
Set Case Status Button	✓	✓	All versions
Toggle Button	✓	✓	All versions
Trending Articles	✓	✓	All versions
User Profile Image	✓	✓	All versions
User Profile Summary	✓	✓	All versions
User Profile Summary & Image (Deprecated)	✓	✓	Winter '16 and later
CUSTOM COMPONENTS			

Component	Koa	Kokua	Available in Versions
Custom Lightning Components	✓	✓	Winter '16 and later

Account Brand Details

Use the Account Brand Details component to show company information and brand details on the Account Management page.

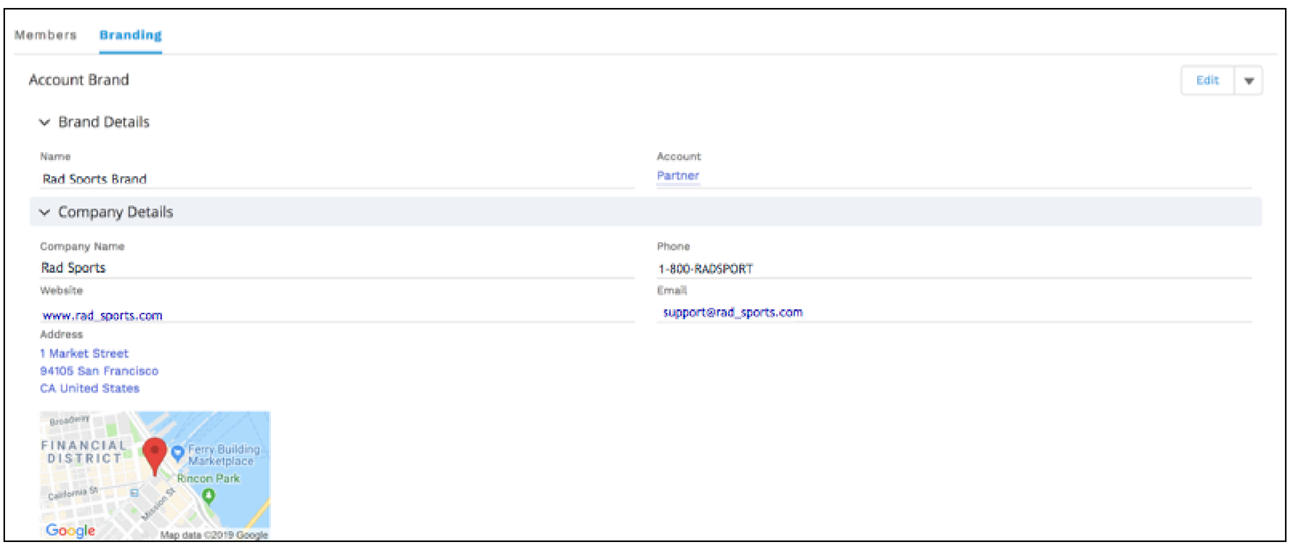
When you go to the Account Management page, you can access Experience Cloud site members and account brand details. Account brand details contains company information used for branding purposes, such as websites, email address, phone numbers, addresses, and company logos.

Note: Add the Account Brand related lists to Accounts, so partners can access brand information.

1. Drag the **Account Brand Details** component to the page, and select it.
2. In the property editor, configure properties for the component:

Property	Details
`Account Id`	Account Id is used to look up the associated Account Brand record.

Example: Account Brand Details component:



Account Management

Channel managers can delegate partner users to help manage accounts. Using the Members tab, delegated account managers can activate and deactivate accounts and reset a member's password. They can also manage branding assets that channel managers can use to create co-branded emails, marketing campaigns, and websites.

Partner users who have been granted delegated external user administration rights can access Account Management from their Experience Cloud site. From Account Management, they can manage members of their partner account from the **Members** tab.

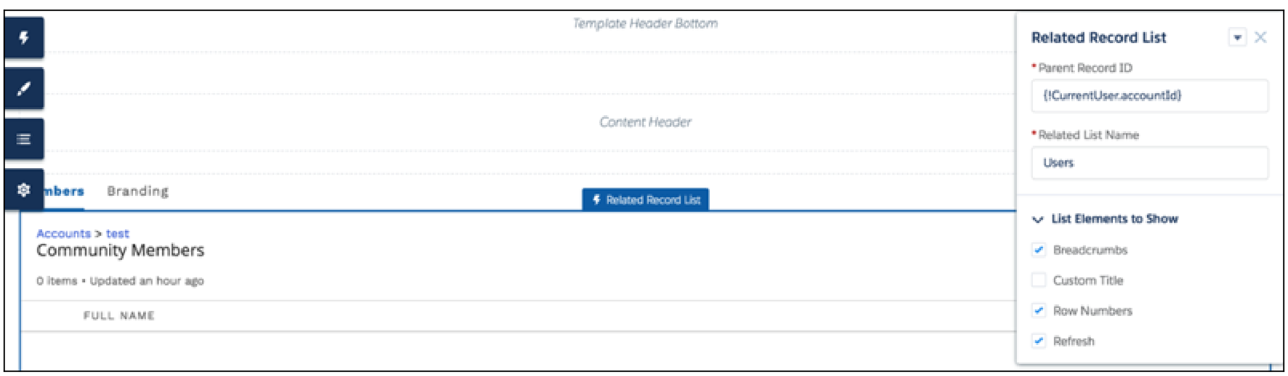
Partner users who have been granted delegated external user administration can create and edit account brands from the **Branding** tab.

Note: Add the **Account Brand** and **Members** related lists to the **Account** page layout, so partners can access member and brand information.

1. Select the **Account Management** component in the page you're configuring.
2. Click the tab that you would like to configure.
3. To view the component properties, select the Properties pane:

Property	Details
`Parent Record ID`	{!CurrentUser.accountId}
`Related List Name`	Name of the related list displayed.
`List Elements to Show`	• Breadcrumbs • Custom Title • Row Numbers • Refresh
`Account Id`	{!CurrentUser.accountId}

Example: Account Management component in Experience Builder



Activities

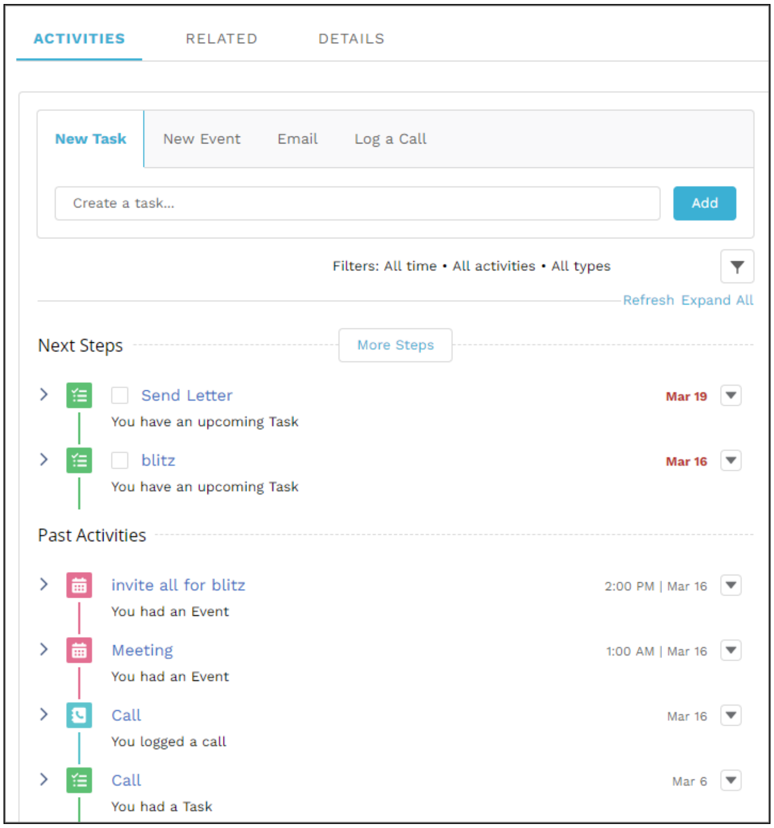
Track your open activities and activity history and view them from a record information tab in your Experience Cloud site.

Activities are supported for accounts, campaigns, claims, contacts, contracts, insurance policies, leads, opportunities, orders, quotes, and activity-enabled custom objects. Activities aren't available in Experience Builder site when viewed on a mobile browser.

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

Property	Details
`RecordId`	The ID of the record. This value is automatically populated.

Example:



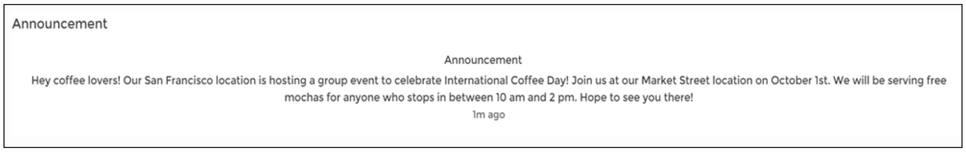
Announcement Section

The Announcement Section component displays group announcements from any page in your Experience Buildersite.

1. Select the **Announcement Section** component.
2. In the property editor, configure properties for the component:

Property	Details
`Group ID`	Enter a group ID. To find a specific group ID, navigate to the group home page and copy the ID from the URL. The ID is a string of numbers and letters. Group URL format example: `https://`*`MyDomainName`*`.my.site.com/`*`siteName`*`/s/group/0F7A0000000DZXiNQO/`*`groupName`* For this URL, the group ID is *`0F7A0000000DZXiNQO`*.
`Header Label`	Enter header text for your component. The default is *`Announcement`*.

Example: Sample Announcement Section component:



Article List

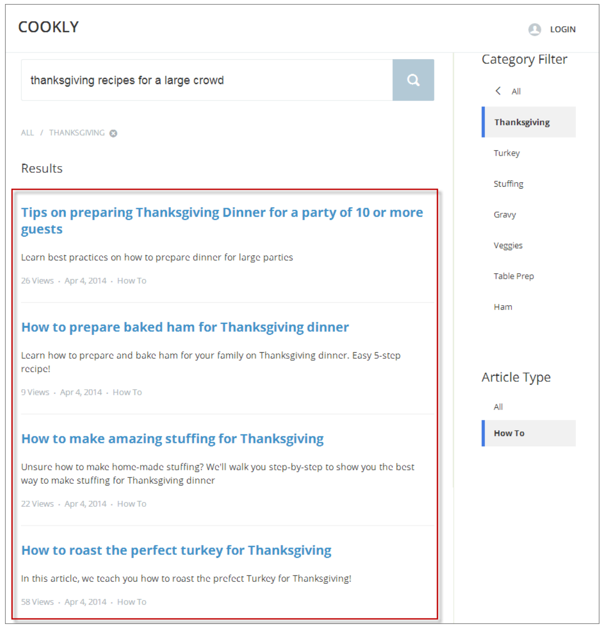
The Article List component lets users view articles that result from a search or from filtering without needing to leave the page.

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

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

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

Example: Sample Article List component:



SEE ALSO:

Which Components Can I Use with Each Aura Template?

Article Type Filter

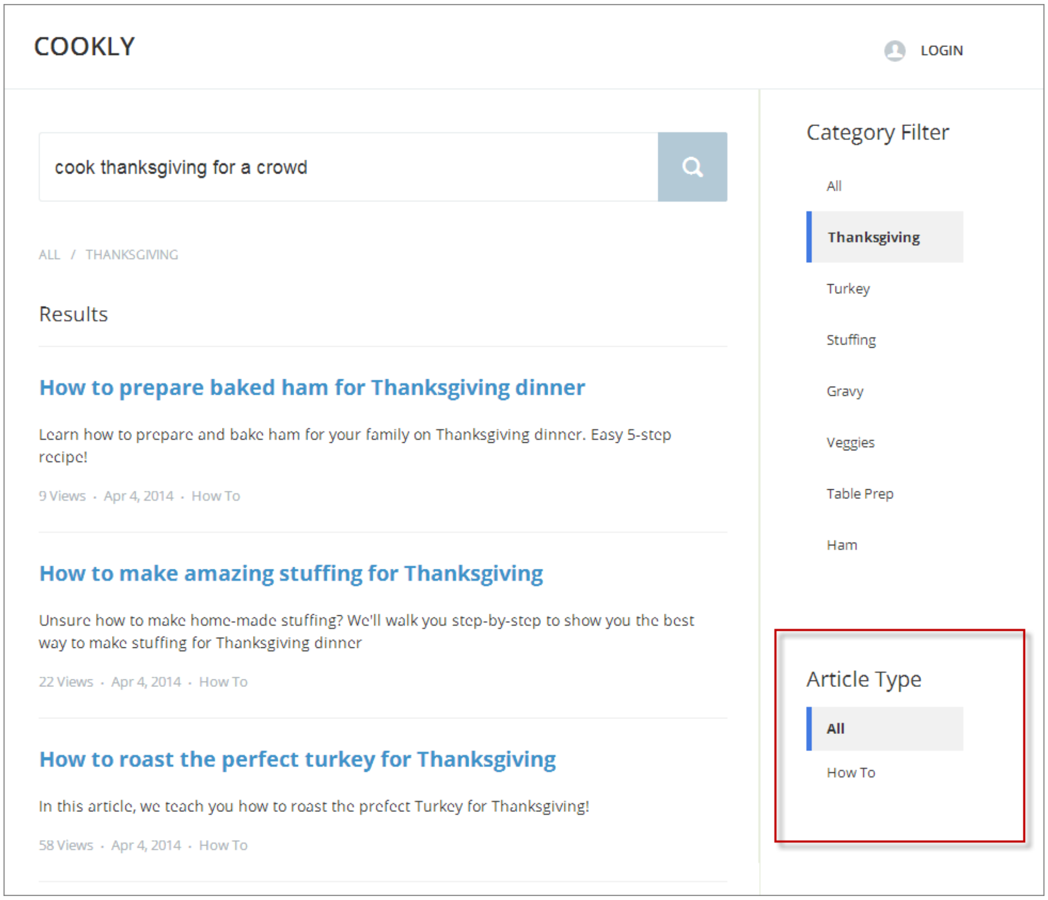
The Article Type Filter component lets users filter the article list based on the selected article type after they've viewed search results.

An article's type determines the type of content it contains, its appearance, and which users can access it.

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

   There are no properties to set for this component.

Example: Sample Article Type Filter:



SEE ALSO:

Which Components Can I Use with Each Aura Template?

Article Content

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

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

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

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

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

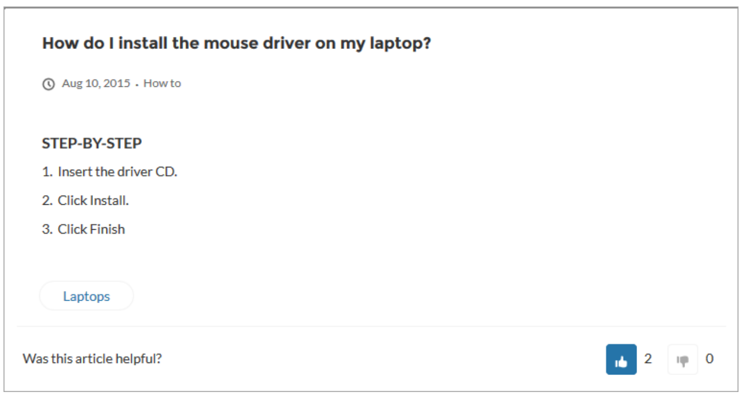
The user can return to the article later to view their vote, but can't change it or see voting data from other members. You can view an article's voting data at the top of the article in your org.

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

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

Property	Details
`Record Id`	This value is retrieved when the individual article is selected.
`URL Name`	This value is retrieved when the individual article is selected.
`Show title in the article header`	Select this option to show the title in the article's header.
`Allow voting on articles`	Select this option to let users vote on articles. This option is not selected by default. This functionality is available only in the Winter '16 and later versions of Experience Builder templates.
`Show topics`	Select this option to show topics associated with an article.

Example: Sample Article Content component:



SEE ALSO:
Which Components Can I Use with Each Aura Template?

Articles with This Topic

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

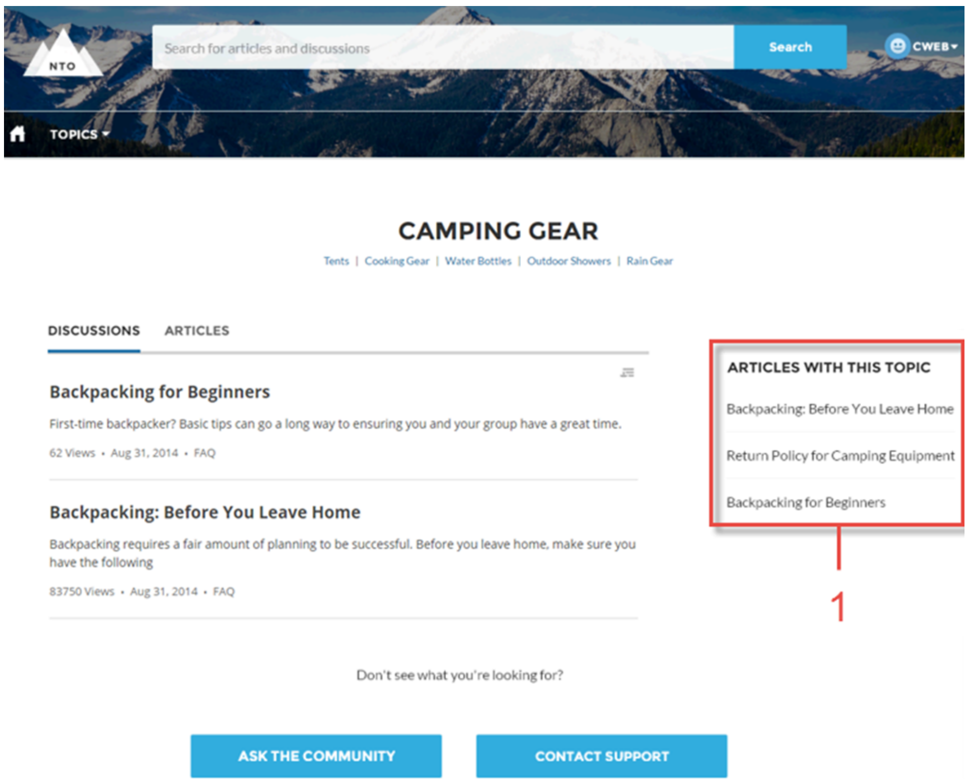
1. Select the **Articles With This Topic** component in the page you're configuring.
2. In the property editor, configure properties for the component:

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

Property	Details
`Show Title`	Show the title by checking this box.
`Number of Articles`	Select the number of articles you'd like to show at a time. The default number is 10.

Note: In order for articles to populate this component, the site language and article language must match.

Example: Sample Articles With This Topic component:



SEE ALSO:

Which Components Can I Use with Each Aura Template?

Ask Button

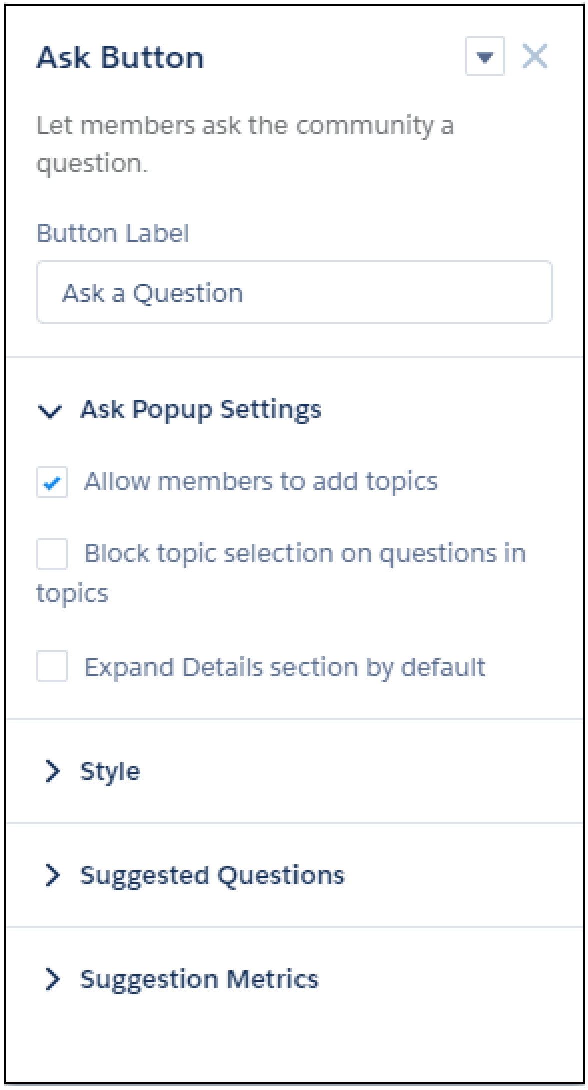
The Ask Button component lets users click a button to ask a question that is then published to the site. Users must log in to ask questions and participate in discussions.

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

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

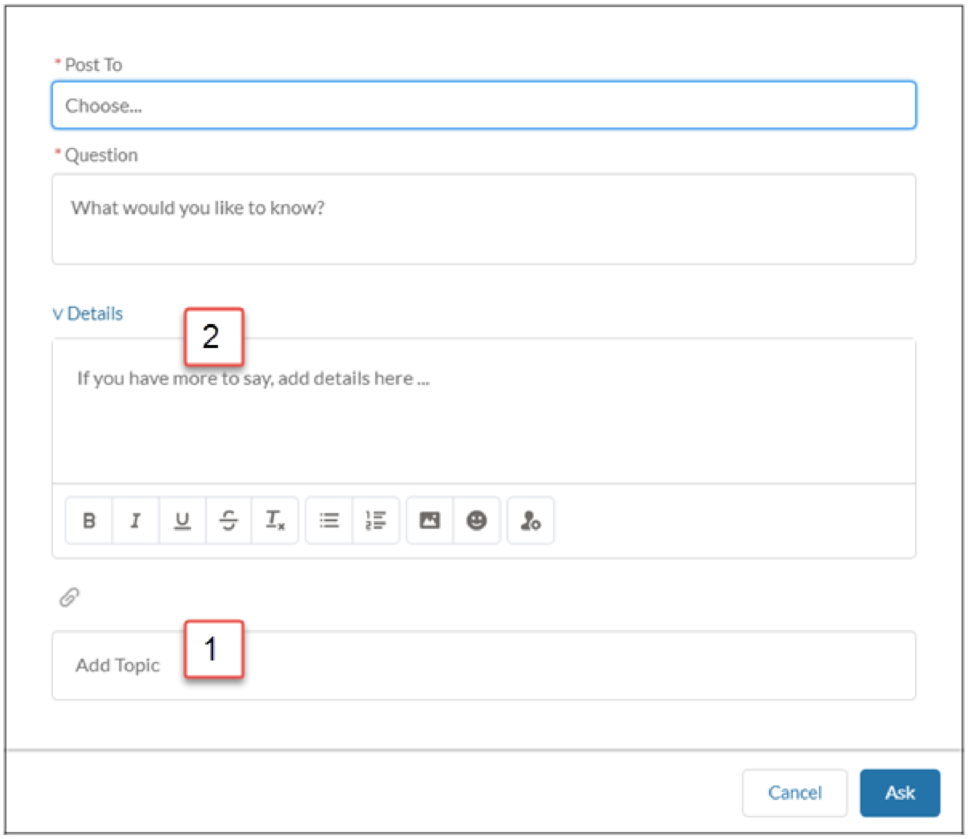
1. Select the **Ask Button** component on the page you're configuring.

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



Property	Details
`Button Label`	Enter the text to show on the Ask button. The default is *`Ask a Question`*.
`Allow members to add topics`	Select to show the topic area at the bottom of the feed publisher (1) and to allow members to add topics.
`Block topic selection on questions in topics`	In a topic feed, block members from choosing a different topic from the Post To list when they ask a question.
`Expand Details section by default`	When a member asks a question, show the Details section in an expanded state (2).

Property	Details
`Button Text Color`	Set the color to use for button text when the button is inactive. Note: For all values, link icon shows that the current selection comes from colors defined in the Experience Builder theme.
`Button Text Hover Color`	Set the color to use for button text when a member mouses over the button. In Experience Builder, you can test hover colors in Preview mode.
`Button Background Color`	Set the color to use for the button background when the button is inactive.
`Button Background Hover Color`	Set the color to use for the button background when a member mouses over the button. In Experience Builder, you can test hover colors in Preview mode.
`Button Border Color`	Set the color to use for the border that surrounds the button.
`Button Border Radius`	Move the slider to control the amount of curve to use for the button shape.
`Max Button Width`	Move the slider to control the width of the button. Width percentage is set against the full width of the container the button sits in. So 100% is the full width of the container, rather than the full width of the browser page.
`Button Alignment`	Set the position of a button within its container by selecting *`Center`*, *`Left`*, or *`Right`*.
`Suggest questions`	Select to show previous questions that are similar to the one the member is asking. This property assists with question deflection and helps in using existing resources.
`Include discussions in suggestions`	Select to show discussions related to the question the member is asking. This property assists with question deflection and helps in using existing resources.
`Include articles in suggestions`	Select to show Knowledge articles related to the question the member is asking. This property assists with question deflection and helps in using existing resources.
`Max Suggestions to Show`	Set the maximum number of questions, discussions, and articles to show to a member who is asking a question.
`Show satisfaction prompt`	Select to show the member a prompt that asks if they were satisfied with the information provided when they asked a question.
`Satisfaction Prompt`	Enter the question you want to ask a member about their satisfaction with the questions, discussions, and articles provided in response to their question. The default is *`Did we help to answer your question?`* Frame the question so that a positive response shows that your data helped and a negative response shows that it didn't. Member response data provides you with metrics on the effectiveness of question deflection.
`Ask follow-up question`	Select to ask the member a follow-up question to their satisfaction response.
`Follow-Up Prompt`	Enter the follow-up question you want to ask the member. The default is *`Can we close your question?`* A member's positive response closes the question without posting it. A negative response keeps the member's question active.
`Confirmation Message`	Enter a confirmation message to show when a member responds to your prompts. The default is *`Got it!`*



Example: Sample Ask Button component:

SEE ALSO:

Which Components Can I Use with Each Aura Template?

Case Deflection

Back Button

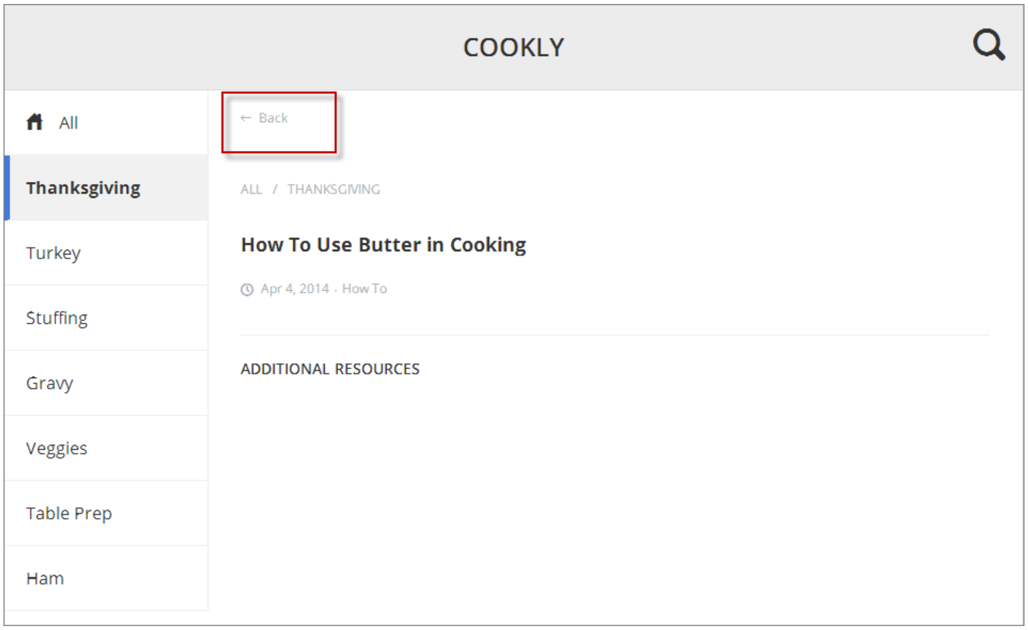
The Back Button component displays a button that lets users navigate to the previous context.

Note: The Back Button is available as a standalone component only in Kokua communities built before the Spring '15 release.

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

   There are no properties to set for this component.

Example: Sample Back Button component:



SEE ALSO:

Which Components Can I Use with Each Aura Template?

Breadcrumb

Use the Breadcrumb component in an Experience Builder site template on topic, article, or feed detail pages to let your customers easily navigate back to parent or grandparent topics.

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

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

Note: While topics reside in a fixed hierarchy, articles and feeds can be assigned to multiple topics at once. When an article or feed is assigned to a multiple of topic hierarchies, the Breadcrumb component shows topics that are the most discussed in a site.

Breadcrumbs don't appear on top-level topic pages.

SEE ALSO:

Which Components Can I Use with Each Aura Template?

Campaign Marketplace

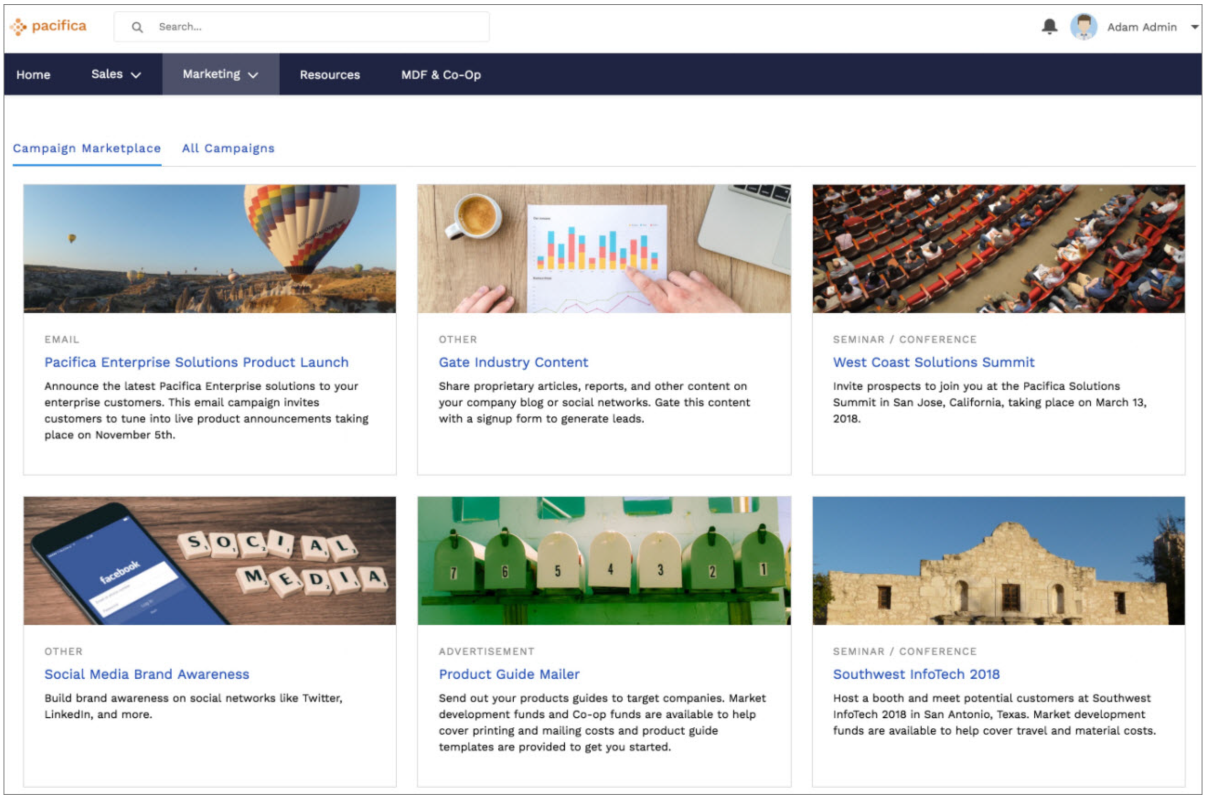
With Campaign Marketplace, you can provide the structure and guidance necessary for partners to successfully execute campaigns. Channel marketers can create and share marketing campaigns, guidelines, and assets with partners. Partners can then choose which campaigns work best for them.

Configure Campaign Marketplace to display pre-approved campaigns for partners. This feature is available in Lightning experiences and Lightning Bolt solutions.

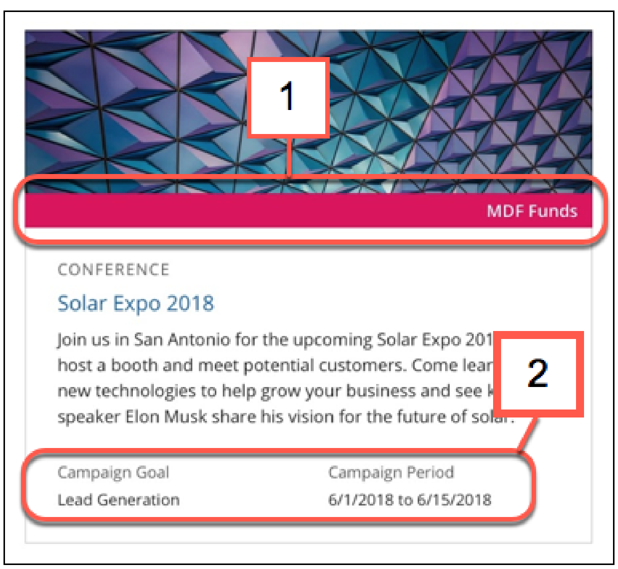
1. Select the **Campaign Marketplace** component in the page you're configuring.
2. In the property editor, configure properties for the component:

Property	Details
`List View Name`	This field looks up to the list view of campaigns created by the admin.
`Sort By`	This field establishes how campaign tiles are categorized.
`Sort Order`	This field establishes the order that campaign tiles appear in.
`Header Label`	The label that appears at the top of the campaign marketplace.
`Show Image`	Select this option to display the `Image` field on a campaign.
`Highlight`	This designates the field to highlight in the campaign marketplace.
`Highlight Color`	Select a color to highlight your campaigns with.
`Category Field`	This field appears at the top of each campaign tile. Add a category field to callout important information about a campaign.
`Title Field`	The title of the campaign.
`Body Field`	Information displayed in the body of the campaign tile.
`Data Fields`	Add data fields to call out additional important information about a campaign. The data fields appear at the bottom of the campaign tile.

Example: Organize marketing campaigns with the Campaign Marketplace.



Add 1) highlights and 2) data fields to call out additional information about a campaign.



Case Attachments

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

Note: This component was retired in all Salesforce orgs in the Summer '19 release. Starting Summer '17, new Experience Builder sites could no longer use this component. Sites already using the component can still use it, but if you delete the component or the page containing it, you can't use it again. To continue using the Case Comments feature, make sure that the Case Comment related list is added to the case page layout used in Experience Builder site.

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

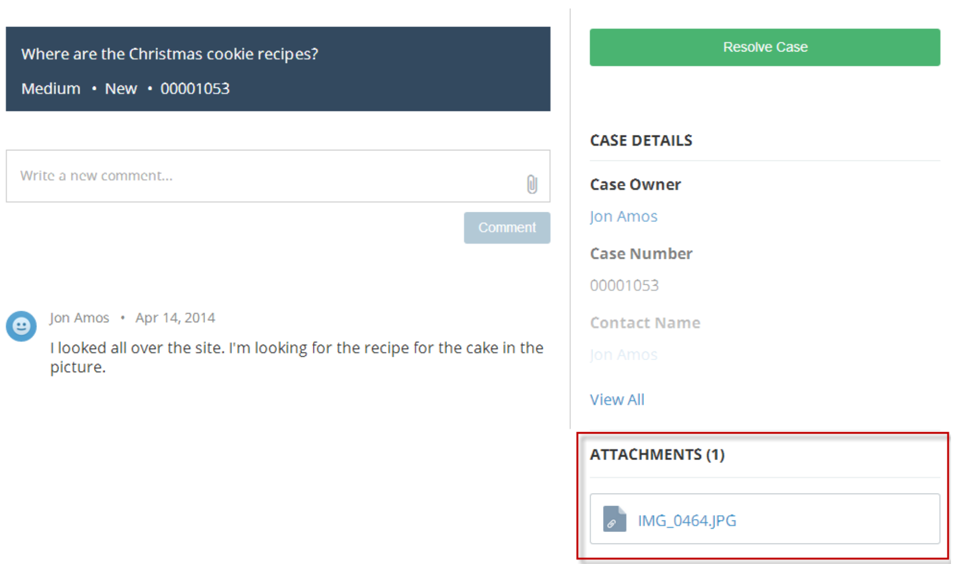
Note:

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

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

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

Example: Sample Case Attachments component:



SEE ALSO:

Which Components Can I Use with Each Aura Template?

Case Banner

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

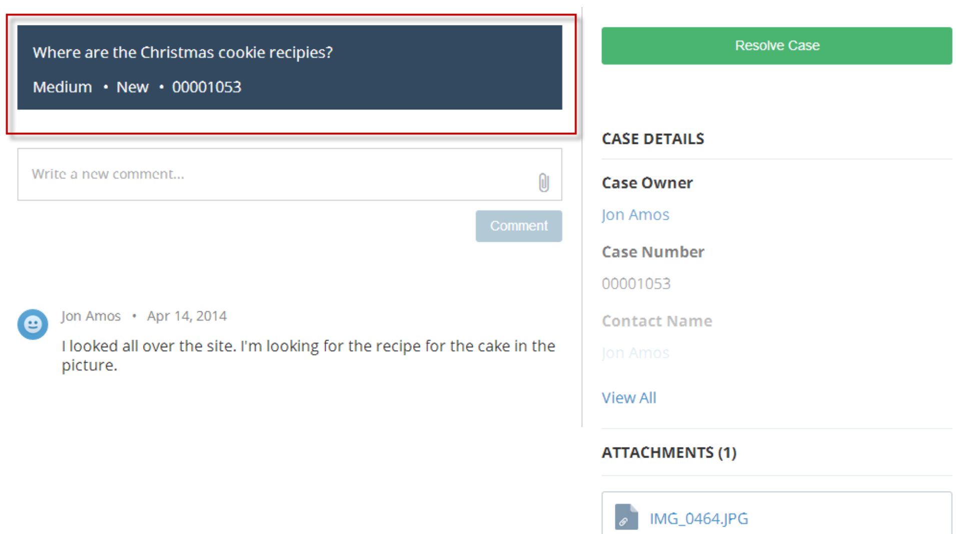
Note: This component was retired in all Salesforce orgs in the Summer '19 release. Starting Summer '17, new Experience Builder sites could no longer use this component. Sites already using the component can still use it, but if you delete the component or the page containing it, you can't use it again. To continue using the Case Comments feature, make sure that the Case Comment related list is added to the case page layout used in Experience Builder site.

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

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

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

Example: Sample Case Banner component:



SEE ALSO:

Which Components Can I Use with Each Aura Template?

Case Comments

The Case Comments component in Experience Builder shows a list of all the comments that a customer and an agent have added to the case. The comments are visible as related records.

Note: This component was retired in all Salesforce orgs in the Summer '19 release. Starting Summer '17, new Experience Builder sites could no longer use this component. Sites already using the component can still use it, but if you delete the component or the page containing it, you can't use it again. To continue using the Case Comments feature, make sure that the Case Comment related list is added to the case page layout used in Experience Builder site.

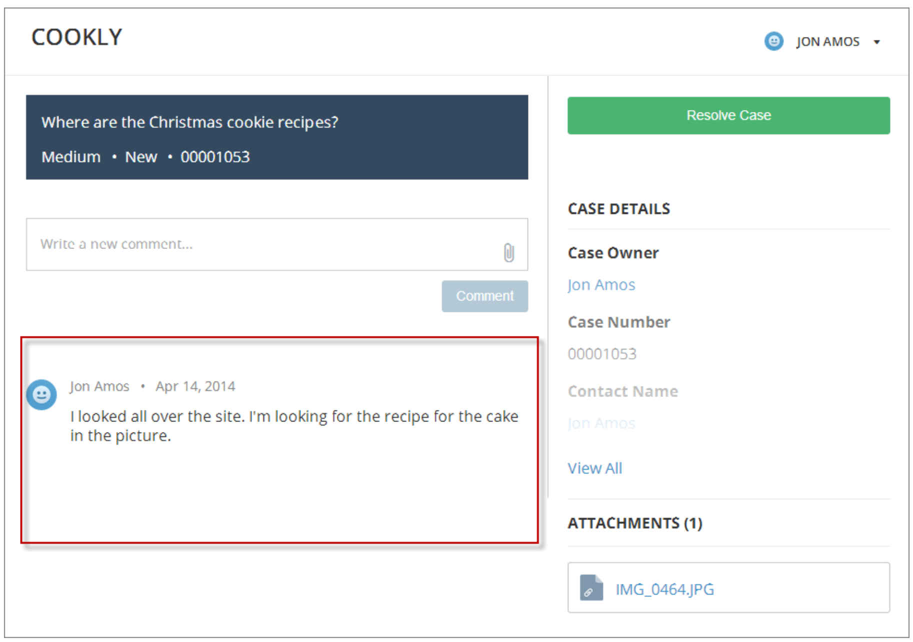
If an attachment has been uploaded with a comment, it's shown separately in the Attachments component.

For users to see case comments, the Case page layout and case record types for their profile must include the Case Comments related list. When you click **Show All** on the Related List, only the first 1,000 case comments are displayed. To see the remaining case comments, use the API.

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

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

Example: Sample Case Comments component:



SEE ALSO:

Which Components Can I Use with Each Aura Template?

Case Deflection

The Case Deflection component searches text as it's being entered into the Contact Support Form component, and returns relevant articles and discussions. If users don't get the answer they need, they can continue with their request for support.

Note: For guest users, a case deflection search matches article titles only. It doesn't return matches from the body of the article.

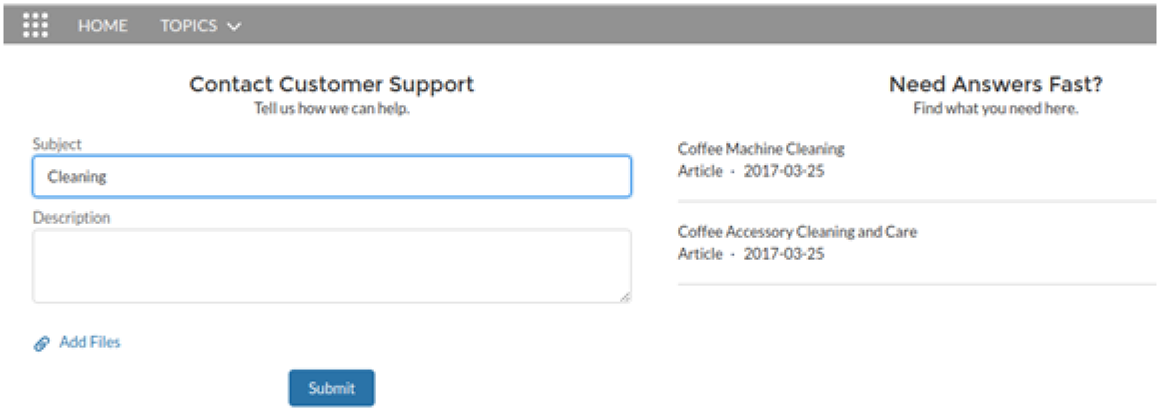
If you built your Experience Cloud site before Spring `18, you could be using the Create Case Form component. A revamped version, ushered in with Spring `18, has split the component into two: the Contact Support Form and the Case Deflection components. We recommend you update your existing site to use the new components, as future updates and improvements will be made on Contact

Support Form and Case Deflection. Moreover, the new components allow you to use the Case Deflection Dashboard to verify the efficacy of your site's case deflection. If you want to migrate to the new components, check out this topic.

1. Select the **Case Deflection** component in the page you're configuring. Avoid placing the component in the template header or footer of the page. Doing so causes the component to appear on all pages.
2. In the property editor, configure properties for the component:

Property	Details
General Settings	Click to expand.
`Title`	Bold text that appears over suggested articles and discussions. The default is **Need Answers Fast?**.
`Subtitle`	Bold subtitle shown over suggested articles and discussions. The default is **Find what you need here.**.
`Maximum Suggestions to Display`	Maximum number of suggested articles and discussions to show. The default is 6.
Empty State Content	Click to expand.
`Topic ID`	Use the dropdown menu to elect a topic to show before site users start entering text in the Contact Support Form component. If you leave this field empty, the component shows trending topics.
Content Types	Click to expand.
`Articles`	Select to include articles in suggestions.
`Discussions`	Select to include discussions in suggestions.
Deflection Metrics	Click to expand. You can view the data that's gathered in this section in the Case Deflection Dashboard. This dashboard is available as part of the Salesforce Community Management Package, which you can find on the AppExchange.
`Ask users if they're satisfied with the suggested content`	Let users tell you whether the suggested articles and discussions helped solve their case.
`Satisfaction Prompt`	Ask users if they're satisfied with suggestions. Default text is: **Did the content help solve your issue?**
`Ask follow-up prompt`	Ask a follow-up question, provided users answer the first question.
`Follow-Up Prompt`	Enter the text to use for your follow-up question. Default text is: **Stop creating your case?**
`Redirect URL for Abandoned Cases`	The URL of the page you'd like users to see if they abandon their case.
`Confirmation Message`	Default text is: **Got it!**

Example: Sample Case Deflection component:



SEE ALSO:

Ask Button

Contact Support & Ask Buttons

Case Comments Publisher

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

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

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

Note: Users must have edit access on cases in order attach files with the Case Comments Publisher component.

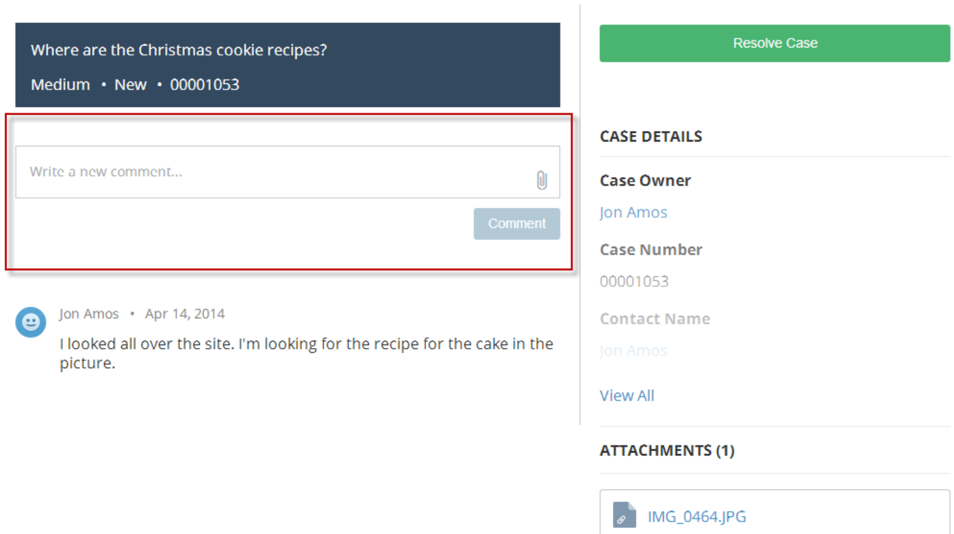
By default, users can attach any supported file type that is 5 MB or less. You can restrict the types of files that users can upload by changing the default values for content types on the Library tab.

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

Property	Details
`Case ID`	Leave the default query string for the unless you plan to customize the component and add your own query string. The system uses the query string in this field to return the Case ID.
`Publisher Placeholder Text`	Enter the text that appears in the search bar. The default value is **Write a new comment...**.
`Mobile Header Text`	Enter the text that appears as the header for mobile users. Mobile and tablet see the text as the header for the comment text area.

Property	Details
`Can Attach Files`	Lets users attach a file to the comment.
`Post Button Label`	Enter the text for the button that submits the case or comment.

Example: Sample Case Comments Publisher component:



SEE ALSO:

Which Components Can I Use with Each Aura Template?

Case Detail

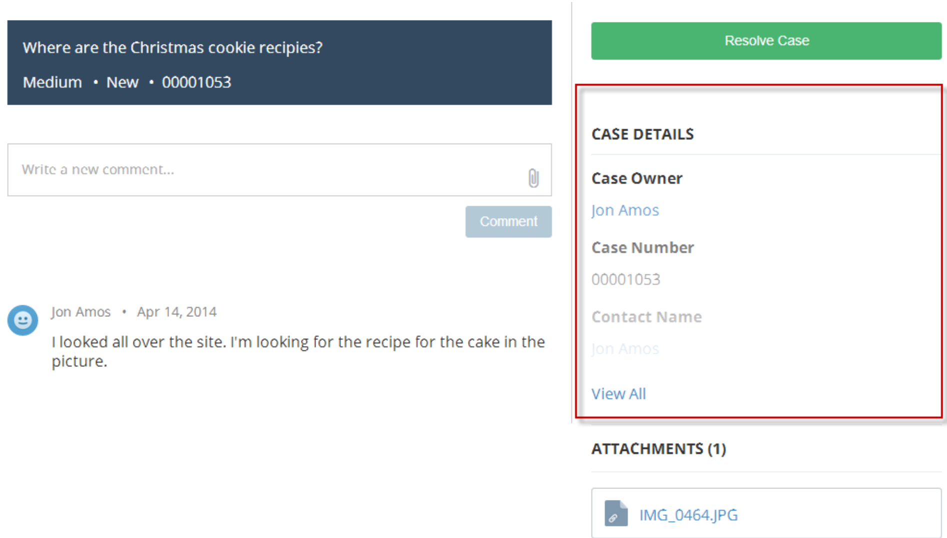
The Case Detail component lets users see all of the details of their case in a collapsible section.

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

Note: This component was retired in all Salesforce orgs in the Summer '19 release. Starting Summer '17, new Experience Builder sites could no longer use this component. Sites already using the component can still use it, but if you delete the component or the page containing it, you can't use it again. To continue using the Case Comments feature, make sure that the Case Comment related list is added to the case page layout used in Experience Builder site.

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

Example: Sample Case Detail component:



SEE ALSO:

Which Components Can I Use with Each Aura Template?

Case Feed

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

Note: This component was retired in all Salesforce orgs in the Summer '19 release. Starting Summer '17, new Experience Builder sites could no longer use this component. Sites already using the component can still use it, but if you delete the component or the page containing it, you can't use it again. To continue using the Case Comments feature, make sure that the Case Comment related list is added to the case page layout used in Experience Builder site.

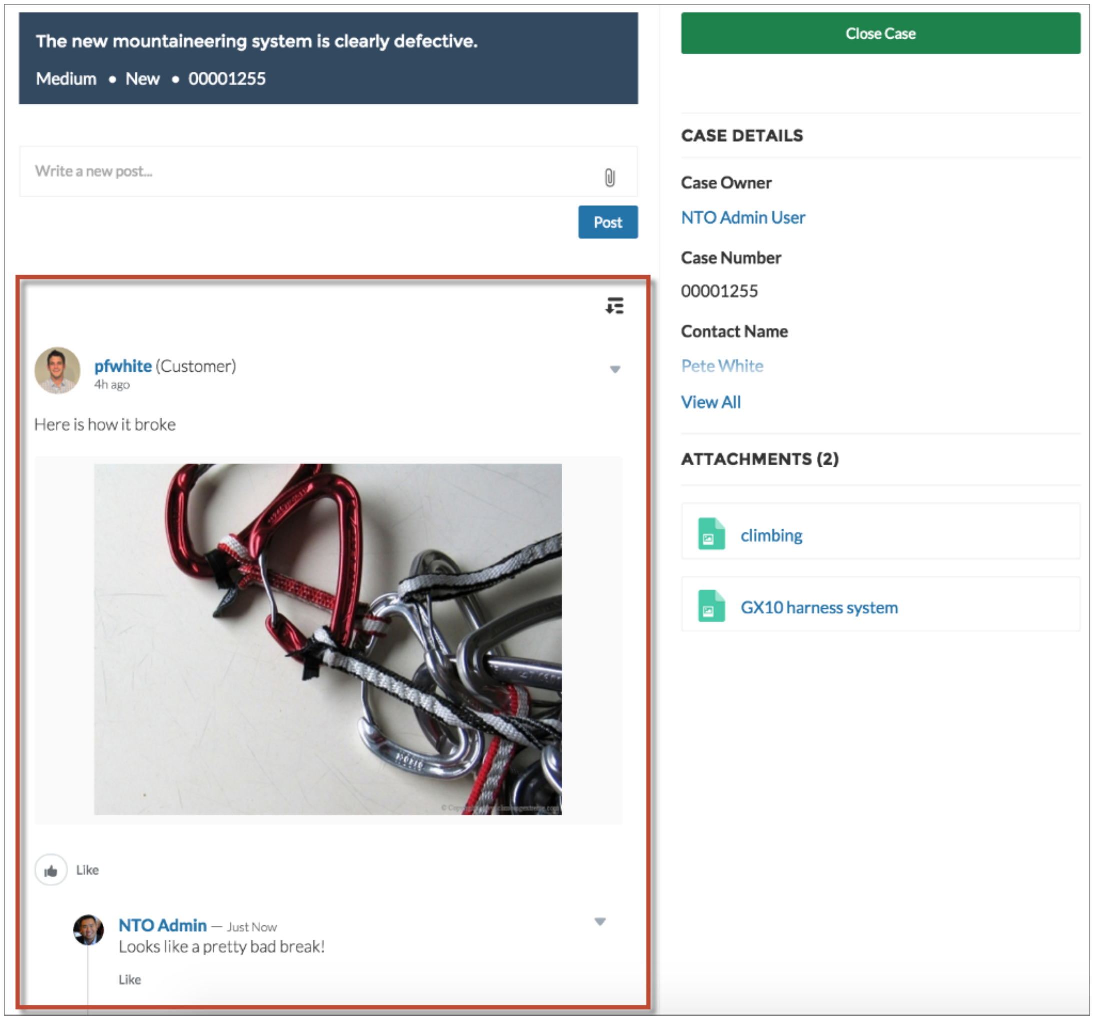
Comments and attachments on posts appear inline below the post for desktop and tablet users, and attachments are also shown separately in the Attachments component.

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

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

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

Example: Sample Case Feed component:



SEE ALSO:

Which Components Can I Use with Each Aura Template?

Case Feed Publisher

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

Note: This component was retired in all Salesforce orgs in the Summer '19 release. Starting Summer '17, new Experience Builder sites could no longer use this component. Sites already using the component can still use it, but if you delete the component or the page containing it, you can't use it again. To continue using the Case Comments feature, make sure that the Case Comment related list is added to the case page layout used in Experience Builder site.

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

Important:

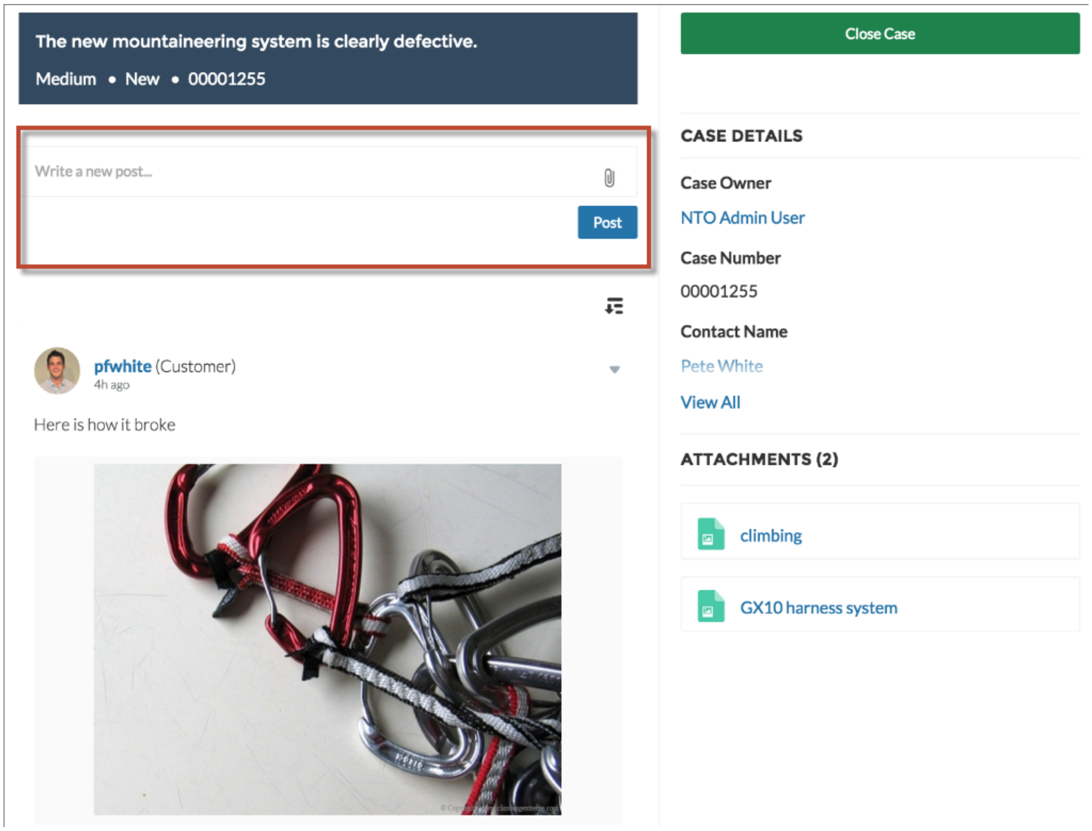
- Make sure to enable the site case feed so users see supported case interactions in their feed. For details, see Set Up the Site Case Feed.
- If an agent posts on a customer's case within a site built using the Customer Service template, the post is only visible to other internal users. To ensure that customers see agent posts, agents should use the Community action in the console.

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

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

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

Example: Sample Case Feed Publisher component:



SEE ALSO:

Which Components Can I Use with Each Aura Template?

Case List

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

Note: This component was retired in all Salesforce orgs in the Summer '19 release. Starting Summer '17, new Experience Builder sites could no longer use this component. Sites already using the component can still use it, but if you delete the component or the page containing it, you can't use it again. To continue using the Case Comments feature, make sure that the Case Comment related list is added to the case page layout used in Experience Builder site.

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

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

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

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

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

Example: Sample Case List component:

SEE ALSO:

Which Components Can I Use with Each Aura Template?

Channel Menu

Use the Channel Menu component to add the menu and button to your Experience Cloud site.

1. Complete these setup tasks to add the Channel Menu to your Experience Cloud site.
2. From the Components list, select the Channel Menu component and drag it onto the page that you're configuring.
3. On the page, select the **Channel Menu**component.
4. In the property editor, configure properties for the component:

Property	Details
Channel Menu Deployment	Choose from the picklist for your org's Channel Menu Deployment.

Category Filter

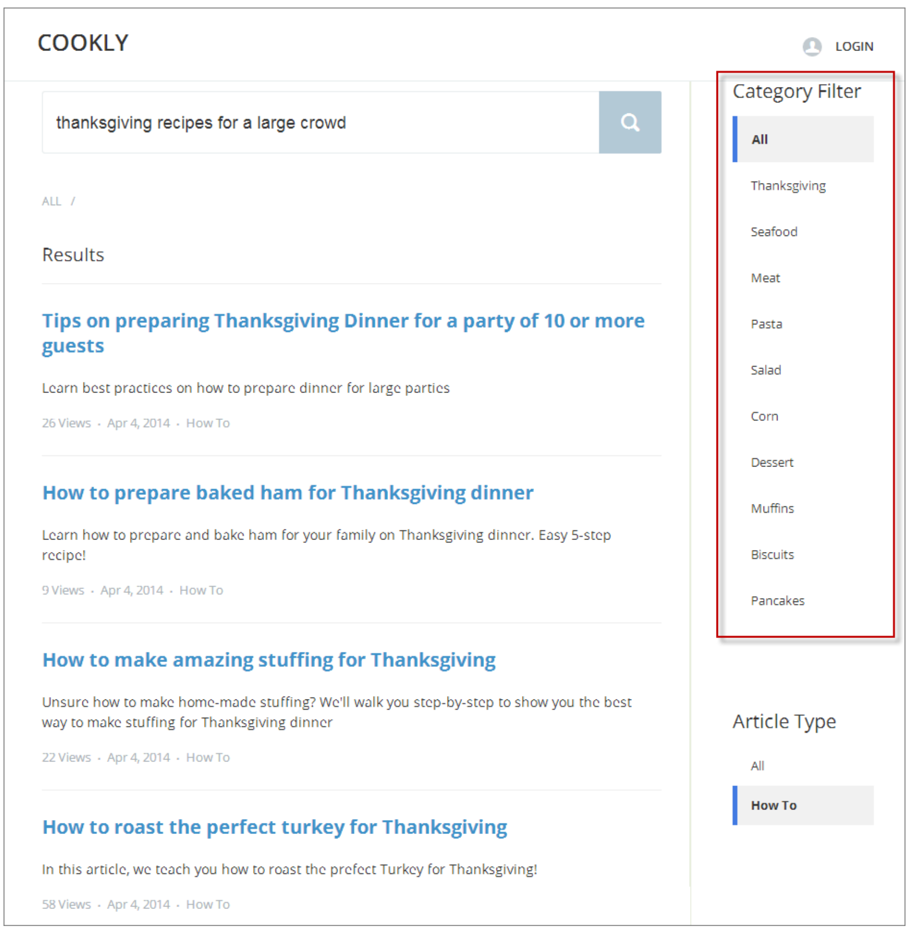
The Category Filter component lets users filter the article list based on selected data categories so that they can see articles from those categories only.

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

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

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

Example: Sample Category Filter component:



SEE ALSO:

[Which Components Can I Use with Each Aura Template?]

Category Navigation

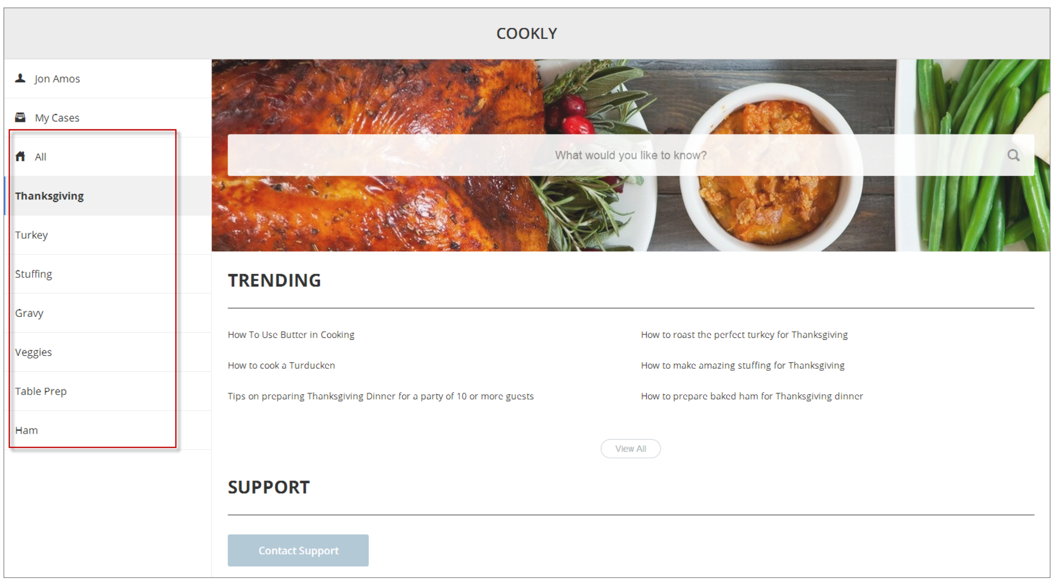
The Category Navigation component shows a list of child categories for a selected parent category.

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

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

Property	Details
`Category Name`	The top-level category that contains the subcategories for articles is automatically set using an expression that uses the top-level category you specified in the template's Custom Properties.
`Auto-Collapse`	Select the checkbox to have the category navigation component collapse automatically after a category is selected.

Example: Sample Category Navigation component:



SEE ALSO:

Which Components Can I Use with Each Aura Template?

CMS Collection

The CMS Collection component displays curated content from Salesforce CMS and from your Salesforce CRM.

The CMS Collection component can be added to a page multiple times and can use collections created from CMS content or Salesforce CRM data. Collections are created in the Content Management area of Experience Workspaces. You can add the CMS Collection component to pages before you create your first collection. But until a collection is associated with the component, you can't access the layout options.

USER PERMISSIONS

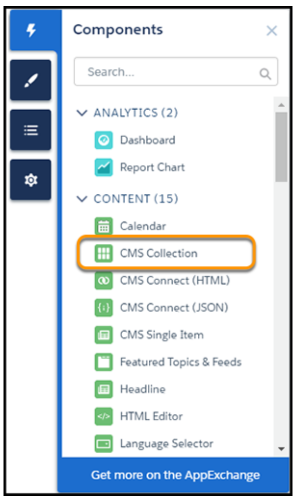
To access an Experience Builder site's Content Management workspace:

- Create and Set Up Experiences
- AND is a member of the site

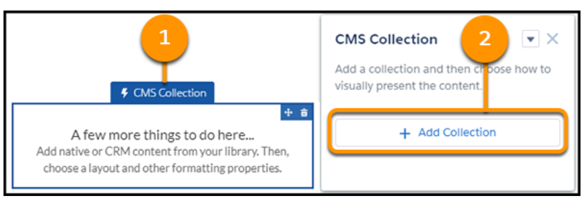
To customize an Experience Builder site:

- Create and Set Up Experiences OR assigned an experience admin, publisher, or builder role in that site
- AND is a member of the site

1. Add a **CMS Collection** component to your page.



2. To open the options menu, click the component (1). To select an available collection, click **+ Add Collection** (2).



3. Choose a collection from your library, and click **Save**.

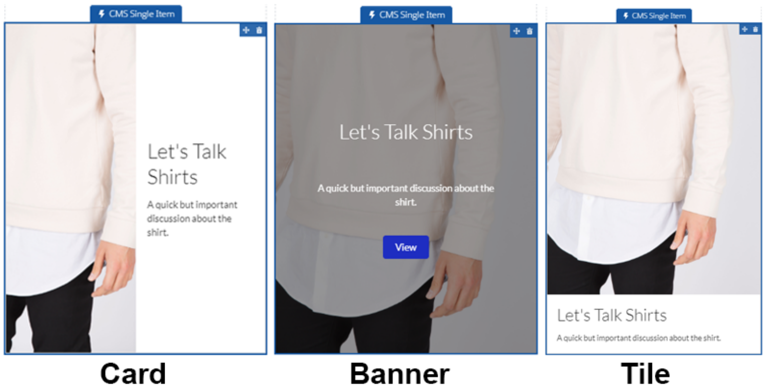
   Note: The Type column indicates the source of a collection. **News** is any collection composed of CMS content. When you see an object name, such as **Account** or **Product**, that indicates a Salesforce CRM collection.

4. Now that there's content feeding into the component, you can work with two layout options.
   - **Collection Layout** determines how the individual content items are displayed on the page within the component. For instance, as a 3x3 grid or as a carousel.
   - **Content Layout** options control how the content from an individual item is displayed within its box in the collection layout. For instance, how images are presented or how text is laid out for each individual item.

5. To customize the display options, select **Collection Layout**.

To make sure that you get the effect and experience you envision, always test your site. Of the many layout options, some interact in powerful ways, some in unexpected ways, and other in ways that you didn't expect. For example, **Transition Speed** is the time from beginning of a transition to end of a transition in milliseconds. Transitions begin when the user chooses to change to the next slide. It doesn't measure the time the content is visible.

6. Select the **Content Layout**. Content layout options include Card, Banner, or Tile.



7. Select the content fields you want to use in your display. Layout options for selected fields are added to your component menu.

   Some of the content fields are probably familiar, such as headline and subheading. But others, such as flag and metadata, probably aren't as obvious.

   Flags are small overlays that sit over your content, flagging them for your reader's attention. The flag only appears if there's data in the associated content field, mapped in the Field Mappings area. One common use is to flag items on your site as "new" or "on sale".

   Metadata #1 and Metadata #2 are general, unnamed fields that you can map to content from your content or CRM data as you need.

8. Map your available content fields to the available fields in the component in the Field Mappings section.

   When using a Salesforce CMS component, the fields from the objects or content types are mapped into the content fields, such as Headline and Image. However, you can remap the fields to populate your component differently. For each property, select an available field from the dropdown. Your changes are saved as you go along and reflected in the preview.

   Note: If there isn't a CSS file present with explicit definitions, its possible changes to the CSS tag in certain fields, like Headline, aren't reflected visually. In these cases, the tag has been updated and responds to CSS declarations when they're available.

   For Salesforce CRM content, the optional **View** links to the record detail page for the content item associated with the button. For CMS content, it links to the detail page for that content type, which can be configured separately.

   Note: Some display areas don't respect rich text elements of the content. For instance, flag and headline ignore elements such as bold coming from the bound field.

Note: Be cautious when using the CMS Collections component to show products in a B2B Commerce store. The component doesn't respect user entitlements. All users with access to a page where the component shows products, see all products that are exposed through the component.

SEE ALSO:

Which Components Can I Use with Each Aura Template?

CMS Connect (HTML)

The CMS Connect (HTML) component lets you display HTML content from a content management system (CMS). After setting up a connection in your CMS Connect workspace, drag a CMS Connect component on a page to render content from that connection.

Before using the CMS Connect (HTML) component, set up a connection on page 618 in your CMS Connect workspace. Then choose **Use in Builder** for the connection you want to use.

1. From the Component panel in Experience Builder, drag a CMS Connect component to the page and location where you want to display it.
2. Select the component. In the property editor, configure its properties.

Property	Details
`CMS Source`	Select the CMS source that contains the content to display. If no sources are listed, click **Manage Connections** to set one up.
`Component Path`	Enter the path to the component to display. If the connection has a root path, enter only the component part of the path. For example, if you entered `content/capricorn` for the root path, enter only `banner1` for the component path. If your connection doesn't have a root path, enter the full path for the component.
`Personalization`	Select the option to enable personalization for this particular instance of CMS Connect (HTML) component. Personalization lets you keep branding and other content consistent between your community and your website.

CMS Connect (JSON)

The CMS Connect (JSON) component displays JSON content from a content management system (CMS).

Before using the CMS Connect (JSON) component, set up a connection on page 618 in your CMS Connect workspace. The connection includes the server URL and paths to your JSON information. It also defines content lists and content items that you want to display. Then choose **Use in Builder** for the connection you want to use.

1. In Experience Builder, drag a CMS Connect (JSON) component from the Components panel to the location on the page where you want to display it.
2. Using the property editor, configure the component's properties.

Property	Details
`CMS Source`	Select the CMS source containing the content that you want to display. If no sources are listed, go to your CMS Connect workspace and define content items and content lists for the connection.
`JSON Content`	Select the JSON content. Choose from the content items and content lists that you set up in the connection. In the property editor, the fields that you see depend on what you select. For example, if you select a content list, you see the layout options for a list.
`Component Path`	Applies only for content items. Enter the path to the component to display. For example, enter the ID of a blog.
`Content List Layout`	Choose a layout for your content list. Currently, the only option is Grid. Define the grid layout using the Items Per Page and Columns properties.
`Content List Item Layout`	Choose a layout for items in your content list. Currently, the only option is Card. To specify card properties (Title, Author, and so on), enter a JSON expression or value. For example, enter *`@key`*, *`6`*, or *`{!id}`*.
`Content Item Layout`	Choose a layout for your content item. Currently, the only option is Detail. To specify detail properties (Title, Author, and so on), enter a JSON expression or value.
`Items Per Page`	Enter the number of content items that display on each page.
`Columns`	Enter the number of columns of content items that display on desktops and tablets. Phones display content items in a single column.
`Title`	Enter a JSON expression or text for the title, such as *`@title`*.
`Author`	Enter a JSON expression or text for the author, such as *`@author/name`*.
`Published On`	Enter a JSON expression or text in ISO format for the publish date. For example, *`@date`* or YYYY-MM-DDTHH:mm:ss.sssZ.
`Body`	Enter a JSON expression or text for the content body, such as *`@content`*.
`Image Source`	Enter a JSON expression for the image source of the content item, such as *`@featured_image`*.
`Navigation` section	Set up the navigation link for content items in your content list.

Property	Details
`Link Text`	Enter the link text to display on your site page. The default is Read More.
`Type`	Select whether the link points to a generated page or an external URL with the content items in your content list.
`Page`	Displays the name of the generated detail page. The default name reflects the CMS source and content type name for your connection. To change the default name, URL, or layout of this page, change the page properties using the Pages menu.
`URL`	Enter the fully qualified URL to the content. Note: You can also specify JSON expressions, such as @link.

SEE ALSO:

Reuse Content with CMS Connect JSON
Add CMS Connect (JSON) Components to Your Experience Builder Pages
Example: Connect JSON Content to Your Experience Builder Site

CMS Single Item

The CMS Single Item component displays content items that are created and maintained in the Salesforce CMS app.

Before using the CMS Single Item component, create content in Salesforce CMS. You can add the component to your site without a content source but can’t configure it until you link it to content.

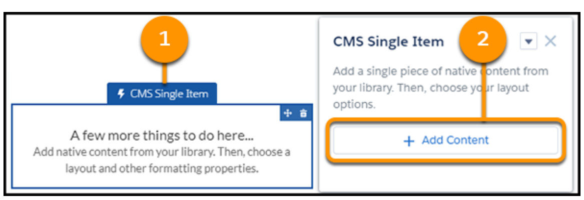
> Note: You can only add published content created in the Salesforce CMS app. If you have a published piece of content and also have a draft version, the latest **published** version is what is available to select.

USER PERMISSIONS

To create, customize, or publish an Experience Builder site:

- Create and Set Up Experiences AND View Setup and Configuration

1. Open Experience Builder.
2. Select and drag the **CMS Single Item** component to your page.
3. To open the options menu, select the component (1). To select Salesforce CMS content, select **+ Add Content** (2).



4. From the available content (content that has been published), select the source and click **Save**.
5. The content populates the component. Decide how to present its contents by expanding **Content Layout**.
6. Customize the layout. There are many familiar layout options for font size, image position, and overlays. There are some that are less familiar.

You can choose the overall configuration of the content by selecting one of the main layouts, each of which has its own options. For instance, you can choose to overlay the banner image with the excerpt you entered in the CMS Content form. You can also add a button with an editable label that opens the full piece of content on the News Detail page when clicked.

Tile and Card layouts have similar options, but use the content fields a little differently. There's no **Show Button** option available for these layouts. For Tile and Card, the title text of the content becomes a link to the detail page automatically.

> Note: Some display areas don't respect rich text elements of the content. For instance, flag and headline ignore elements such as bold coming from the bound field.

7. Select the content fields to use in your display. Layout options for selected fields are added to your component menu.

   Some of the content fields are obvious, such as headline and subheading. But other, such as Flag and Metadata are probably not as obvious.

   Flags are small overlays that sit over your content, flagging them for your reader's attention. The flag only appears if there's content in the associated content field, mapped in the Field Mappings area. One common use is to flag items on your site as "new" or "on sale".

   Metadata #1 and Metadata #2 are general, unnamed fields that you can map from your content as you need.

8. Map your available content fields to the available fields in the component in the Field Mappings section.

   When using a Salesforce CMS component, the fields from the objects or content types are mapped into the content fields, such as Headline and Image. Experience Builder makes its best guess for you, but you can remap the fields to populate your component differently. For any given area, select an available field from the dropdown. Your changes are saved as you go along and reflected in the preview.

   > Note: Sometimes changing the CSS tag, to `Heading 3` in Headline for instance, may not be reflected visually if there isn't a CSS file present with explicit definitions. In these cases, the tag has been updated and responds to CSS declarations when they're available.

9. To make your changes live, publish your site.

SEE ALSO:

Which Components Can I Use with Each Aura Template?

CMS Single Item (Detail)

The CMS Single Item (Detail) component supports Salesforce CMS as the common detail component for material displayed by all CMS Single Item components.

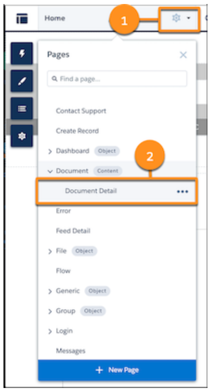
CMS Single Item (Detail) can only be added to a Content page. There is only one detail page for each content type in Salesforce CMS.

1. In Experience Builder open the content type detail page you want to configure from the Pages menu. For example, click the **[down arrow]** (1) and select **Document Detail** (2) for a Document custom content type.

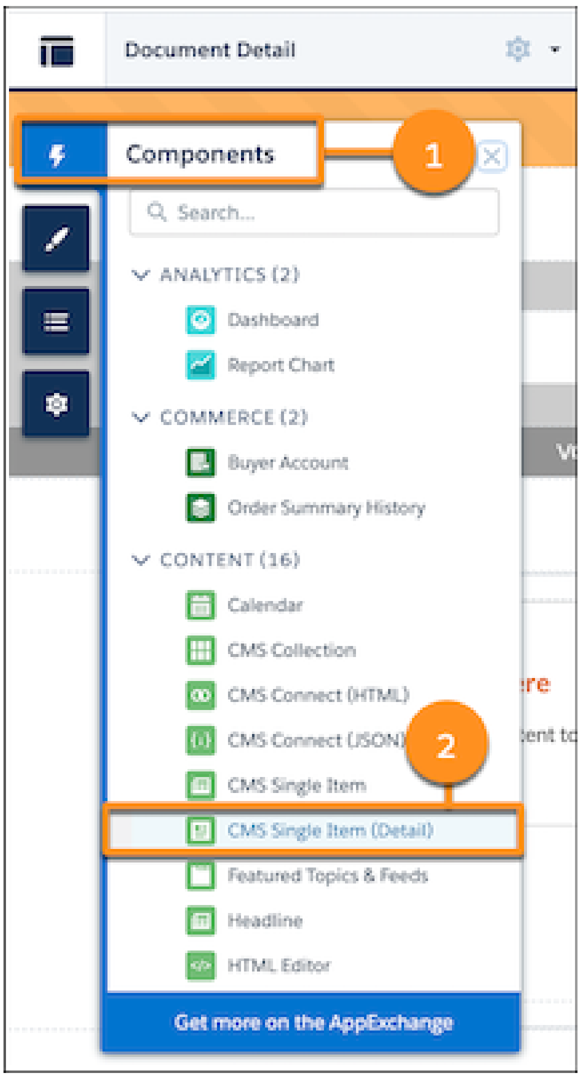
USER PERMISSIONS

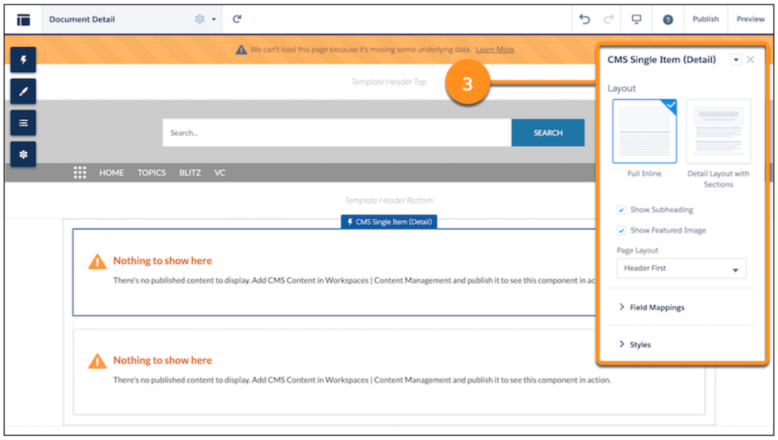
To create, customize, or publish an Experience Buildersite:

- Create and Set Up Experiences AND View Setup and Configuration



2. From the Components menu (1) drag the **CMS Single Item (Detail)** (2) component into the content type detail page. The options menu opens (3).





The CMS Single Item (Detail) component is a general container for all CMS content and can only be used on content detail pages.

The CMS Single Item (Detail) component options let you expose or hide various fields from the CMS content form. Show content fields in a default order, or group them into sections for a more precise layout. Fully customize the appearance of your content for your needs and guidelines. For example, after you add published CMS content to the component use the Field Mappings setting to map content to the layout display fields. Then try the Component Style setting to adjust styles such as alignment, height, and color.

SEE ALSO:

Which Components Can I Use with Each Aura Template?

Calendar

View your events and others' calendars from your Experience Builder site on your desktop or mobile device.

Your admin can configure the calendar to display details in the side panel of the calendar component or they can hide the sidebar. Calendar sidebars are turned on by default and display your "My Events" calendar and other users' calendars that have been shared with you. If your calendar is set up to display the side panel, you can collapse it if you need more space.

Note: There are a few things to keep in mind when using calendars from a site:

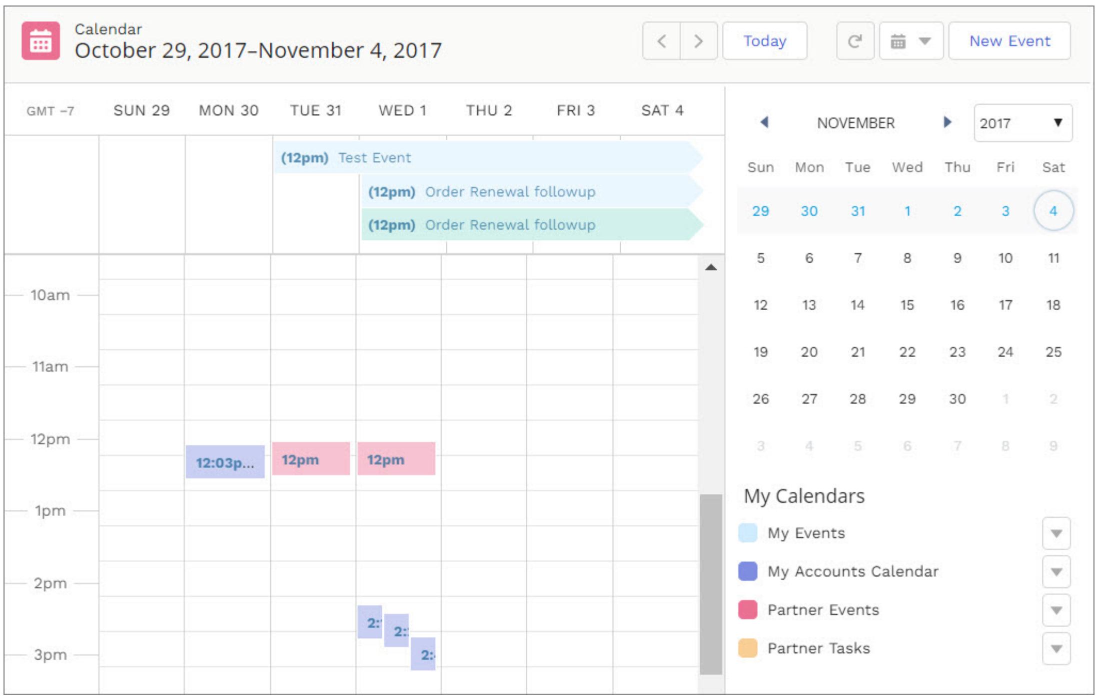
- The option to hide or open the side panel in the Experience Cloud site Calendar is only available in calendars that have been configured to **Show Calendar Sidebar**.
- Internal users and partners users can add a public calendar to their Other Calendars section.
- When added as attendees, partners can see the event preview card, but they can't edit or view complete event details.
- Customer users can't access public calendars and events.
- Partner users can invite people to calendar events using their email addresses. Because partner users can't access other partner users' email addresses, they can't invite other partner users to calendar events.
- Partner users can't view shared calendars from mobile devices.

You can share your My Events calendars with other team members and add their calendars to your view. If you want to change one of your events, simply drag it to a new time slot.

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

Property	Details
`Show Calendar Sidebar`	To display the calendar sidebar by default, select this option. To work with this item, use the full Salesforce site.
`Show Other Calendars`	To display calendars that have been added to user's calendar view, select this option. To work with this item, use the full Salesforce site.
`Let Users Create New Calendars`	Turn on this option to create a calendar. To work with this item, use the full Salesforce site.

Example:



Contact Request Button & Flow

Add the Contact Request Button & Flow component to let members click a button to request that customer support get back to them. Members describe the problem and enter their contact details in a popup window. After the request is sent, a support person can review the issue and contact the customer for follow-up and resolution.

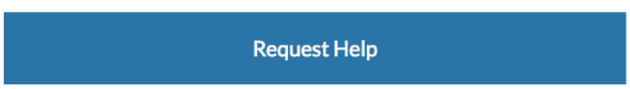
Tip: To use this component, create a contact request flow from the Customer Contact Requests page in Setup. When a customer submits a request, a contact request record is created. You can route contact request records using Omni-Channel.

Contact Request works in public sites and sites that require authentication. Make sure that your site users have the Run Flows permission, including your Guest User profile that's used in public sites. Without this permission, members won't see the button to submit contact requests.

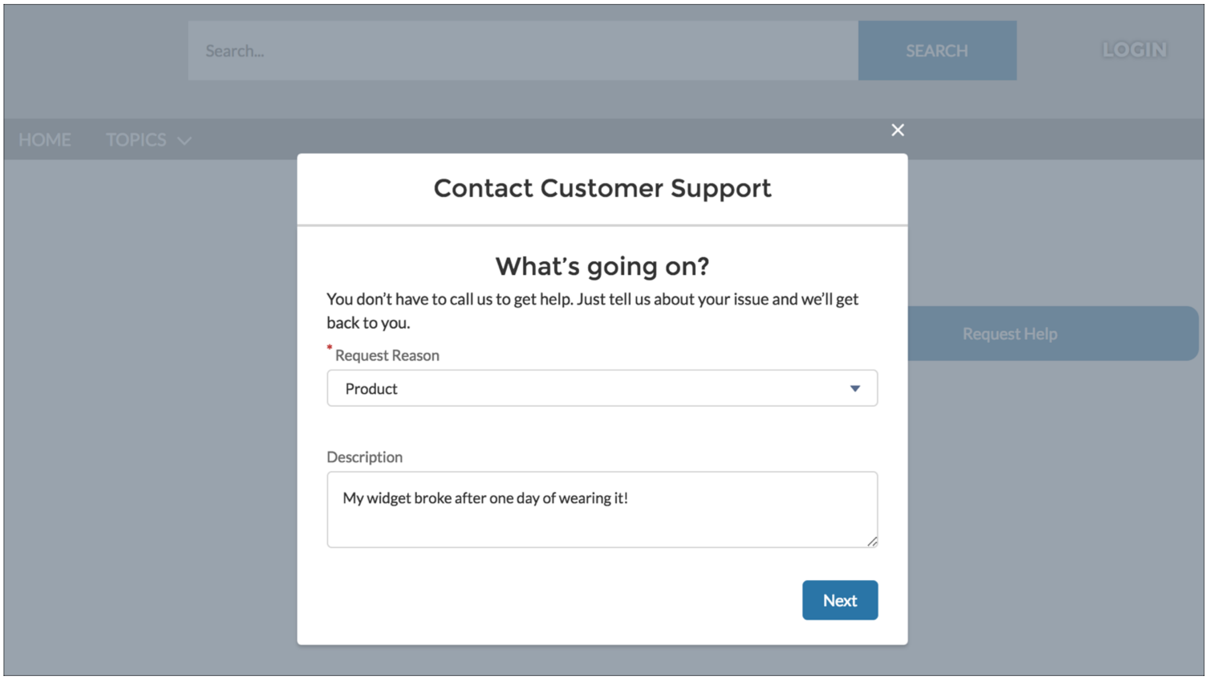
1. On the page that you're configuring, select the **Contact Request Button & Flow** component.
2. In the property editor, configure the component properties.

Property	Details
`Button Label`	The text to display on the support request button. The default is Request Help.
`Contact Request Flow`	Select a contact request flow that you created in Setup or in Flow Builder. Only active flows that have the type Contact Request Flow are supported.
`Button Text Color`	Set the color of text to use for the button label. Note: The link icon shows that the current selection comes from colors defined in the theme.
`Button Text Hover Color`	Set the color of text to use for the button label when a member mouses over the button. In Experience Builder, you can test hover colors in Preview mode.
`Button Background Color`	Set the color to use for the button background when the button is inactive.
`Button Background Hover Color`	Set the color to use for the button background when a member mouses over the button. In Experience Builder, you can test hover colors in Preview mode.
`Button Border Color`	Set the color to use for the border that surrounds the button.
`Button Border Radius`	Move the slider to control the amount of curve to use for the button shape.
`Max Button Width`	Move the slider to control the width of the button. Width percentage is set against the full width of the container that the button sits in. So 100% is the full width of the container, rather than the full width of the browser page.
`Button Alignment`	Select *`Center`*, *`Left`*, or *`Right`* to set the position of a button within its container.

Example: Sample Contact Request Button & Flow component.



When a user clicks the button a popup window appears.



SEE ALSO:

Let Customers Request that Support Get Back to Them

Contact Support Button

The Contact Support Button component adds a button that users click to create a case. When you enable Web-to-Case and set up a guest user case publishing action, guest users aren't required to log in before creating a case.

Each button instance supports its own property values. So, if you have two Contact Support buttons on a page, the values on each button are unique to that button. You can configure buttons to use the values you defined in your theme so that they all look the same. But each button instance remains unique.

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

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

Property	Details
`Button Label`	The text to show on the button that users click to create a case. The default text is `Contact Support`.
`Button Text Color`	Set the color of text to use for the button label. Note: The link icon shows that the current selection comes from colors defined in the theme.

Property	Details
`Button Text Hover Color`	Set the color of text to use for the button label when a member mouses over the button. In Experience Builder , you can test hover colors in Preview mode.
`Button Background Color`	Set the color to use for the button background when the button is inactive.
`Button Background Hover Color`	Set the color to use for the button background when a member mouses over the button. In Experience Builder, you can test hover colors in Preview mode.
`Button Border Color`	Set the color to use for the border that surrounds the button.
`Button Border Radius`	Move the slider to control the amount of curve to use for the button shape.
`Max Button Width`	Move the slider to control the width of the button. Width percentage is set against the full width of the container that the button sits in. So 100% is the full width of the container, rather than the full width of the browser page.
`Button Alignment`	Select *`Center`*, *`Left`*, or *`Right`* to set the position of a button within its container.

Example: Sample Contact Support Button component:

Contact Support & Ask Buttons

The Contact Support & Ask Buttons component adds two buttons to the page. The Contact Support button lets users click a button to create a case. The Ask button lets members ask a question and publish it to the site. All members must be logged in to ask the site a question.

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

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

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

Each button instance supports its own property values. So, if you have two sets of Contact Support & Ask buttons on a page, the values on each button are unique to that button. You can configure buttons to use the values you defined in your site theme so that they all look the same. But each button instance remains unique.

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

Property	Details
`Header Label`	The text to show at the top of the component.
`Ask Community Label`	The text to show on the Ask button. The default text is `Ask a Question`.
`Contact Support Label`	The text to show on the Contact Support button. The default text is `Contact Support`.
`Allow members to add topics`	Select to show the topic area at the bottom of the feed publisher and to allow members to add topics.
`Expand Details section by default`	When a member asks a question, show the Details section in an expanded state.
`Button Text Color`	Set the color of button text to use when the button is inactive. Note: The link icon shows that the current selection comes from colors defined in the theme.
`Button Text Hover Color`	Set the color of text to use when a member mouses over the button. In Builder, you can test hover colors in Preview mode.
`Button Background Color`	Set the color to use for the button background when the button is inactive.
`Button Background Hover Color`	Set the color to use for the button background when a member mouses over the button. In Builder, you can test hover colors in Preview mode.
`Button Border Color`	Set the color to use for the border that surrounds the button.
`Button Border Radius`	Move the slider to control the amount of curve to use for the button border.
`Suggest questions`	Select to show questions that are similar to the one the member is asking. This property assists with question deflection and helps in using existing resources.
`Include discussions in suggestions`	Select to show discussions related to the question that the member is asking. This property assists with question deflection and helps in using existing resources.
`Include articles in suggestions`	Select to show Knowledge articles related to the question that the member is asking. This property assists with question deflection and helps in using existing resources.
`Max Suggestions to Show`	Set the maximum number of questions, discussions, and articles to show to a member who is asking a question.
`Show satisfaction prompt`	Select to show the member a prompt that solicits information about their satisfaction with the content provided to them when they asked a question.
`Satisfaction Prompt`	Enter the question you want to ask a member about their satisfaction with the questions, discussions, and articles you provided in response to their question. The default is *`Did we help to answer your question?`* Frame the question so that a positive response shows that your data helped and a negative response shows that it didn't. Member response data provides you with metrics on the effectiveness of question deflection.
`Ask follow-up question`	Select to ask the member a follow-up question to their satisfaction response.

Property	Details
`Follow-Up Prompt`	Enter the follow-up question that you want to ask the member. The default is *`Can we close your question?`* A member's positive response closes the question without posting it. A negative response keeps the member's question active.
`Confirmation Message`	Enter a confirmation message to show when a member responds to your prompts. The default is *`Got it!`*

Example: Sample Contact Support & Ask Buttons component:

SEE ALSO:

Which Components Can I Use with Each Aura Template?
Case Deflection

Contact Support Form

The Contact Support Form allows guest and authenticated users to create cases from a site. It works with the Case Deflection component to help site members find articles and discussions to answer questions as text is being entered into the form.

If you built your Experience Cloud site before Spring `18, you could be using the Create Case Form component. A revamped version, ushered in with Spring `18, has split the component into two: the Contact Support Form and the Case Deflection components. We recommend you update your existing site to use the new components, as future updates and improvements will be made on Contact Support Form and Case Deflection. Moreover, the new components allow you to use the Case Deflection Dashboard to verify the efficacy of your site's case deflection.

Check out this topic if you want to migrate to the new components.

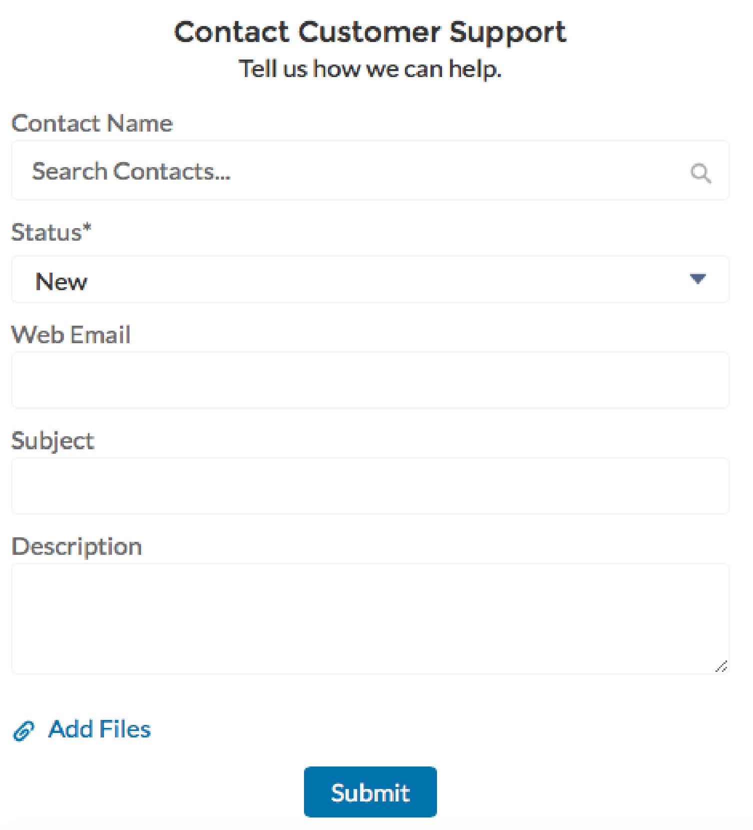
Note: A few things to keep in mind when using the Contact Support Form component:

- Feed items aren't generated for attachments when you create a case with the Contact Support Form component.
- When you configure the case page layout for your site, specify that some fields are required. Adding required fields to the layout ensures that customers don't accidentally submit cases with empty fields.
- Fields with the data type `lookup`, such as Contact Name, Account Name, and custom lookup fields, are not supported for guest users.
- Automatic triggers that change record ownership can affect what object details are visible to users or where the details are displayed. For example, if you create a case using the Contact Support Form component and an automatic trigger changes the case owner, the case record ID appears in the Case Number field.

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

Property	Details
General Settings	Click to expand the section with general setting properties.
`Title`	Text that displays at the top of the form customers use to create a case. The default is **Contact Customer Support**.
`Subtitle`	Subtitle at the top of the form that customers use to create a case. The default is **Tell us how we can help**.
Authenticated Users	Click to expand.
`Global Action`	A global action that allows users to create cases. The global action must be a Create a Record type, and on the case object.
`Configure global actions for authenticated users`	Link to the area in Salesforce Setup where you can create global actions.
`Attach files`	Select to allow users to attach files to their cases. They can upload up to 10 files.
`File Upload Button Label`	Label for the button to allow customers to upload files. Default text is *`Upload File`*.
Guest Users	Click to expand.
`Global Action`	A global action that allows guest users to create cases. The global action must be a Create a Record type, and on the case object.
`Configure global actions for guest users`	Link to the area in Salesforce Setup where you can configure global actions for guest users.
Confirmation Text	Click to expand.
`Confirmation Title`	The title at the top of the page confirming that a case was created. Default text is **Your case was created.**
`Confirmation Subtitle`	More information under the confirmation title, after a case was created. Default text is **We'll get back to you soon.**
`Case Summary`	Shows the case subject and case number for the user's future reference.
`Show Call to Action button`	Select this option to have folks take a follow-up action after filing a case.
`Call to Action`	The URL of the site you'd like your users to see after filing a case.
`Call to Action Text`	Call to action text label, based on what you'd like your users to do.
`Call to Action Button Text`	Text label for the call to action button.

Example: Sample Contact Support Form component:



Create Case Form

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

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

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

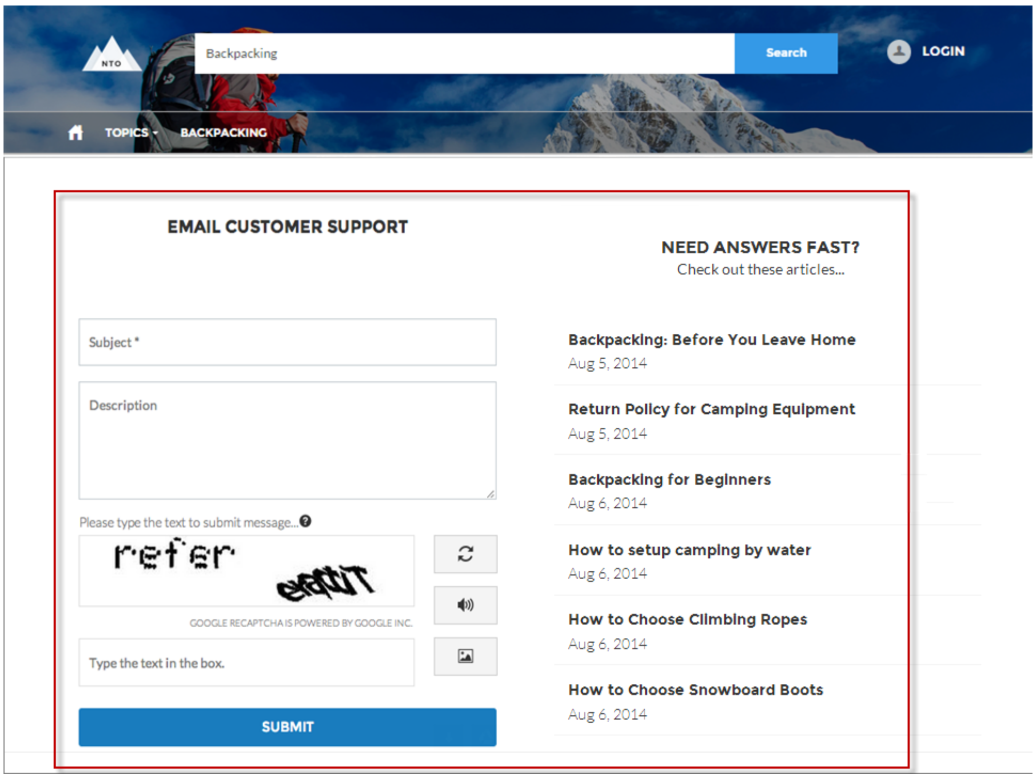
1. Select the **Create Case Form** component in the page you're configuring.
2. In the property editor, configure properties for the component:

Property	Details
General Settings	Click to expand the section with general setting properties.
`Attach Files`	Lets authenticated users attach a file to the comment in the case. Your organization's settings control the limits for file sizes. If you enable Web-to-Case to let guest users create cases, keep in mind that guest users can't attach files to a case.

Property	Details
`Header Title`	Text that displays at the top of the page customers use to create a case. The default is Email Customer Support.
`Confirmation Message Title`	Text that appears as the title of the message confirming that the case has been created. The default is: Your request was submitted successfully.
`Confirmation Message Description`	Text that appears as the body of the message confirming that the case has been created. For example, You'll hear back from us soon.
Actions in the Publisher	Click to expand the section with action properties.
`Signed-In User Case Action`	The name of the action that creates cases for authenticated users. Use the action layout editor for the case object in Salesforce setup to specify which fields to include in the layout. The NewCase action is a default in your Salesforce org.
`Guest User Case Action`	The name of the action that creates cases for unauthenticated users. Use the action layout editor for the case object in Salesforce setup to specify which fields to include in the layout.
Case Deflection	Click to expand the section with case deflection properties.
`Use Case Text to Suggest Articles`	Uses the text users type in the case title and description fields to suggest articles in the deflection area of the page. Article deflection appears only when you've implemented Salesforce Knowledge in your org.
`Number of Articles`	Number of articles that display in the component.
`Top-Level Category`	Top-level data category for template-driven sites using data categories. This is the data category that articles used for deflection come from.
Category Group name for article deflection	Data category group name for template-driven sites using data categories.
`Deflection Banner Text`	Text that displays as the title of the deflection area of the page. The default is Need Answers Fast?.
`Deflection Text`	Text that displays as the subtitle in the deflection area of the page.
`Mobile-Only Deflection Text`	Text that displays in the deflection area for users of mobile devices.
reCAPTCHA Settings	Click to expand the section with reCAPTCHA settings. Important: Google no longer supports reCAPTCHA v1, which is the only version currently available in Experience Builder sites. In order to use reCAPTCHA v2 and above your sites, use a custom Lightning component.
`reCAPTCHA for Guest Case Creation`	Adds the reCAPTCHA widget to your page. The reCAPTCHA widget requires guest users to complete a text field successfully before they can create a case.
`Secret Key for reCAPTCHA`	Enter the key that you received when you registered for the service.

Property	Details
`Site Key for reCAPTCHA`	Enter the key that you received when you registered for the service. Note: Make sure that you thoroughly test the reCAPTCHA widget in your production organization.

Example: Sample Create Case Form component:



SEE ALSO:

Which Components Can I Use with Each Aura Template?

Migrate to the Contact Support Form and Case Deflection Components

If you built your Experience Cloud site before Spring `18, you could be using the Create Case Form component. A revamped version, ushered in with Spring `18, has split the component into two: the Contact Support Form and the Case Deflection components. We recommend you update your existing site to use the new components, as future updates and improvements will be made on Contact Support Form and Case Deflection. Moreover, the new components allow you to use the Case Deflection Dashboard to verify the efficacy of your site's case deflection.

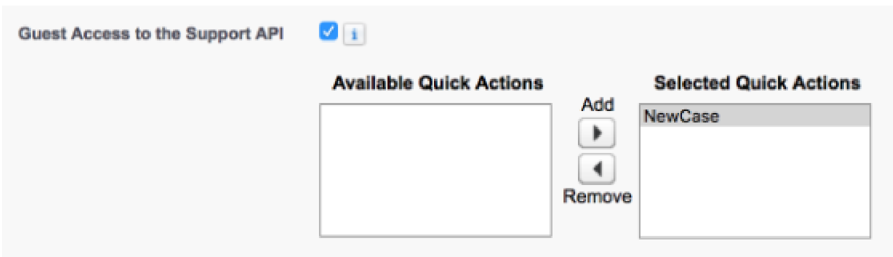
Replace the Case Create Form component with the Contact Support Form and Case Deflection components using the following steps.

Note: Enable Web-to-Case in your org if it's not already enabled.

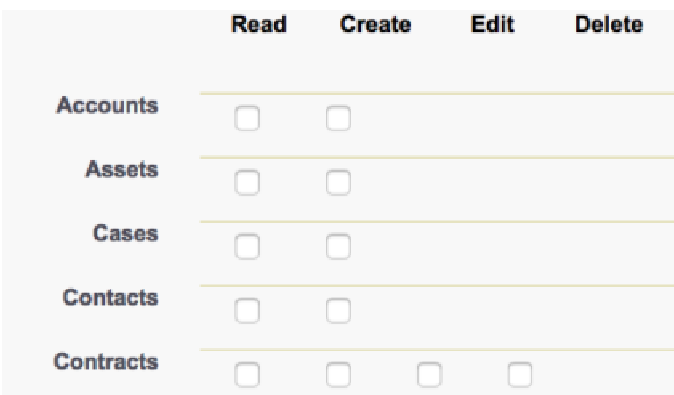
1. Create a new page variation you can use for case deflection. In the Customer Service, make a variation of the Contact Support page. In the Customer Account Portal template, make a variation of the Contact Us page. We recommend the 2-column, 1:1 ratio layout.
2. Drag the Contact Support Form and Case Deflection components on the page. Configure the component properties.

   Note: One of the properties on the Contact Support Form component is the global action used to create cases. Create new global actions in Salesforce Setup. For a global action to be used in the Contact Support Form component, it must be a **Create a Record** action type with the case object as the target.

3. Enable **Guest Access to the Support API**, and add the global actions you want to use.
   a. In Salesforce Setup, enter `Sites` in the `Quick Find` box and select **Sites**.
   b. Select the **Guest Access to the Support API** checkbox to enable it.
   c. Add your global actions to the **Selected Quick Actions** box.



   d. Click **Save**.
4. Configure your site's guest user profile. Disable access to object permissions for guest users.



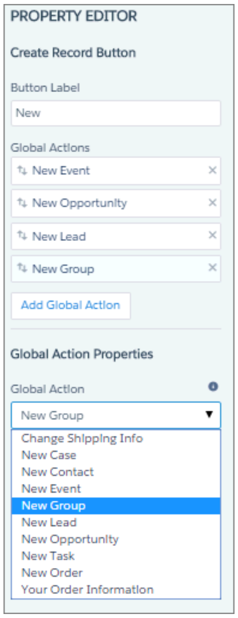
   Note: Your guest users could need object permissions for custom objects, or other functionality in your site. Test your implementation so you have the best object permission configuration for your site.

Create Record Button

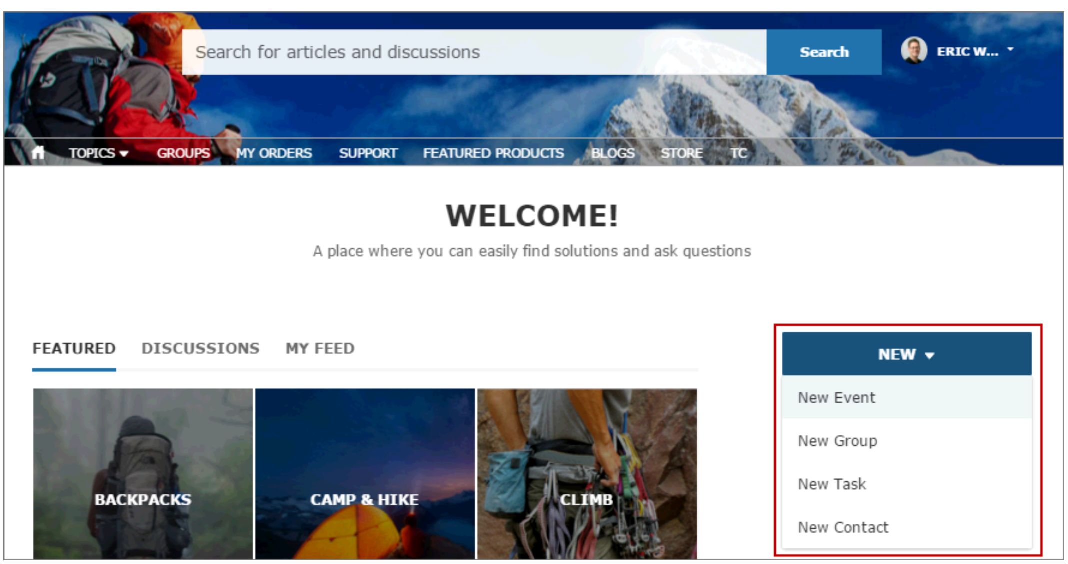
Use the Create Record Button component to allow site members to create records using global actions.

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

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



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



Create Record Form

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

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

Example: Sample Create Record Form component.

Custom Lightning Components

Build your own custom Lightning components to use in Experience Builder sites.

Note: As of API version 45.0, you can build Lightning components using two programming models: Lightning Web Components, and the original model, Aura Components.

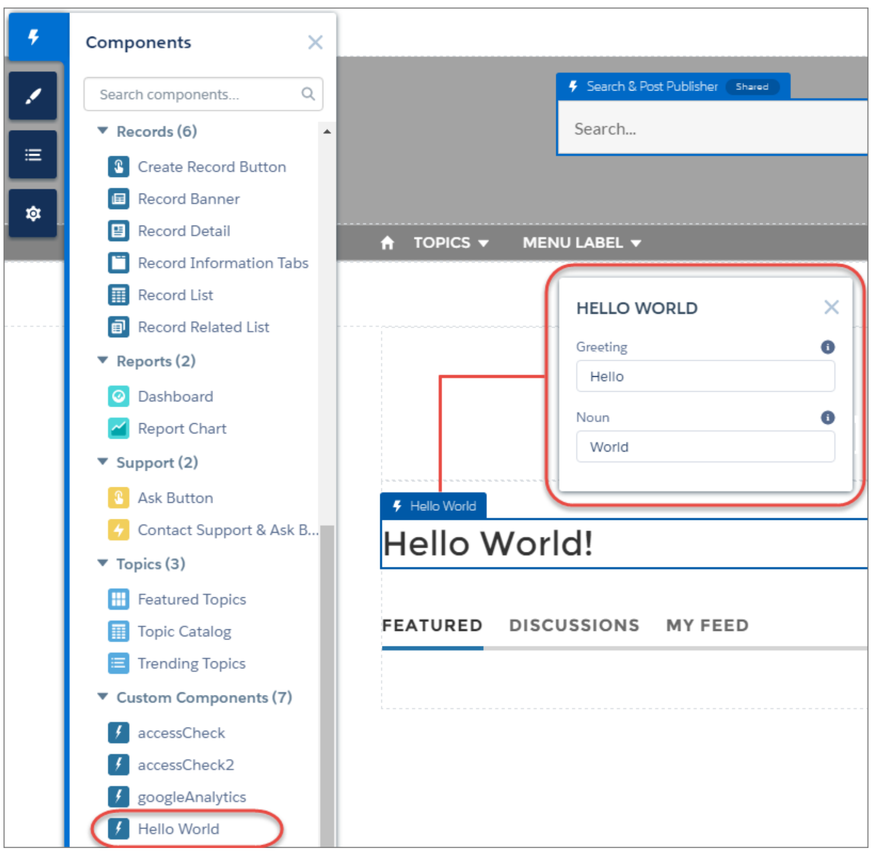
To develop custom Aura components for your Experience Builder site, see *Experience Cloud Developer Guide: Configure Drag-and-Drop Components for Experience Builder*.

To develop custom Lightning web components for your Experience Builder site, see *Lightning Web Components Developer Guide: Configure a Component for Experience Builder*.

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

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

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



EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

Customizable User Profile Menu

The Customizable User Profile Menu component displays a user's name or nickname and profile picture. It also can display a company name or icon. If the user isn't logged in, a Login button appears in the header. Starting in Summer '20, the Customizable User Profile Menu component replaces the User Profile component in Experience Builder sites using the new B2B Commerce Template and new sites using specific themes, including Ember, Stella, Webster, Citizen, Cypress, and Jepson. Existing sites using those themes get the new component instead of the old version when they reapply or change the theme.

1. In the page that you're configuring, click the header component to open the property editor.
2. Expand the Layout section, and select the Customizable User Profile Menu component in the User Profile Component dropdown.
3. Click the Customizable User Profile Menu component to open its property editor.
4. In the property editor, configure properties for the component:

Property	Details
`Login Label`	Enter a label for the Login button that members use to log in to the site. The default is Log In.
`Text Color`	Choose the color of the text for the log in button.
`Text Hover Color`	Choose the color of the text when the user is hovering over the log in button.
`Background Color`	Choose the background color of the log in button.
`Background Hover Color`	Choose the background color to show when the user is hovering over the log in button.
`Border Color`	Choose the border color of the log in button.
`Border Radius (0px - 50px)`	Set the radius of the button border.
`Default Menu`	Choose the default navigation menu to show to authenticated users. To edit your menu selection, click the **Edit** button.
`Menu Style for Authenticated Users`	Choose whether to display a menu icon, the user's name, or both. Note: On mobile devices, only the icon is shown.
`Icon`	Choose whether to use a company logo or an avatar as the menu icon.
`Include Company Name`	Opt to include the company name in the user profile menu. The default is to omit it.
`Text Orientation`	Choose whether to display the company name to the right or left of the icon.

Note:

- When you import a B2B Commerce template, the My Account and Lists options on navigation menus are dropped. Edit the menu, like the Customizable User Profile menu, and recreate these menu options.
- Menu item types system link and event display only in the Customizable User Profile Menu component.

Customizable User Settings

The Customizable User Settings component displays an authenticated user's username, email address, language, locale, time zone, profile visibility, and email notification settings. You can customize the labels for each of these fields to fit your org's needs.

On the Customizable User Settings component, users can change their language, locale, and time zone so that the site is localized appropriately. A user can also see their username and change their email or password. Users can choose to show their profile details to guest users who aren't logged in to the site. Users can also choose to receive email based on events in the site. If users don't want to receive email about events in the site, they can disable email notifications. You have the option of updating the labels on many of these fields.

1. Select the **Customizable User Settings** component on the page.
2. In the property editor, configure properties for the component:

Property	Details
`User ID`	Don't update this field. The system supplies this value.
`Hide the Connected Sources tab`	Prevents the Connected Sources tab from appearing on the Customizable User Settings component.
`Account Details Tab Title`	Customizable text. The label for the Account Details tab. This tab includes account, location, profile visibility, and email notifications section. Default text is **Account Details**.
`Connected Sources Tab Title`	Customizable text. The label for the Connected Sources tab. This tab lists external and other data sources to which the user is connected. Default text is **Connected Sources**.
`User Settings Header`	Customizable text. The label for the settings page. Default text is **My Settings**.
`Account Section Header`	Customizable text. The label for the Account section. This section includes username, password, and email address fields. Default text is **Account**.
`Location Section Header`	Customizable text. The label for the Location section. This section includes language, locale, and time zone fields. Default text is **Location**.
`Hide profile visibility section`	Prevents the Profile Visibility section from appearing on the Customizable User Settings component.
`Profile Visibility Section Header`	Customizable text. The label for the Profile Visibility section. This section includes the option to restrict what others can see on a user's profile page. Default text is **Profile Visibility**.
`Profile Visibility Section Description`	Customizable text. The description of the Profile Visibility section. Default text is **Customize who is able to see what on your profile page**.
`Profile Visibility Section Hint Text`	Customizable text. The hint text that appears when users hover over the help icon next to the description. It defines each visibility level. Default text is **Restricted: Visible to the users who created the site. Members: Visible to logged-in members. Public: Visible to anyone viewing pages, logged in or not.**
`Hide email notifications setting`	Prevents email notifications from appearing in a user's personal Chatter settings.
`Email Notifications Section Header`	Customizable text. The label for the Email Notification section. The section includes options for enabling or disabling all or some email notifications. Default text is **Email Notifications**.

Property	Details
`Email Notifications Section Description`	Customizable text. The description of the section that lists the various actions that send email notifications. Default text is **When email notifications are enabled, email me when someone:**.
`Hide feed and post notifications`	Prevents feed and post notifications from appearing in a user's personal Chatter settings.

Tip: For orgs where Single Sign-On (SSO) is enabled, consider hiding the Change Password link on a user's My Settings page.

a. In Setup, create a permission set, for example *`Single Sign On Link`*.

b. In System permissions, set "Is Single Sign-On Enabled" to *`On`*.

c. Assign the permission set to appropriate users in your org.

The "Change password" page no longer appears on their My Settings page.

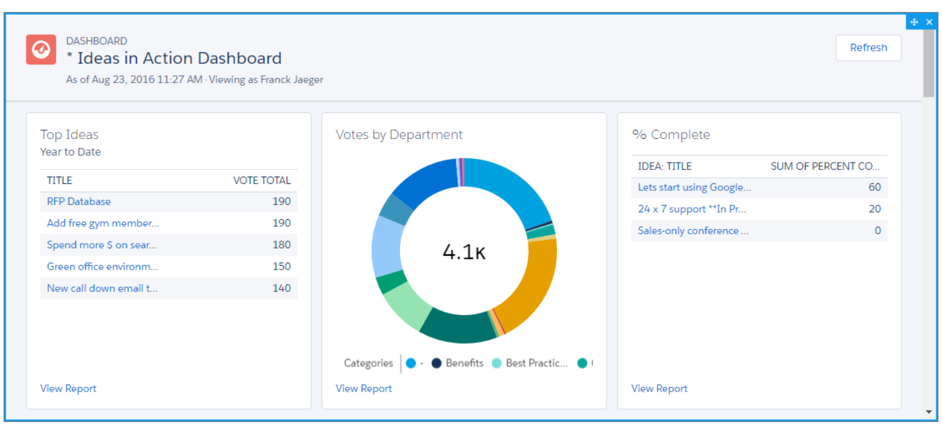
Dashboard

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

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

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

Example: Sample Dashboard component:



Note:

- Members can't change the dashboard's running user in the site. This view is read only.

Dashboard List

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

The dashboard list can be filtered with these criteria:

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

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

- Created by Me
- Shared with Me
- All Folders

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

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

Deflection Tracking

The Deflection Tracking component gathers data from users about the deflection content that you provide. Prompt users with a customized set of answers, and capture their feedback in your Salesforce org. Use the Salesforce Case Deflection Reporting Package for Experience Builder sites to build reports about the effectiveness of your deflection content. Reports help you plan your content strategy with the support of real data.

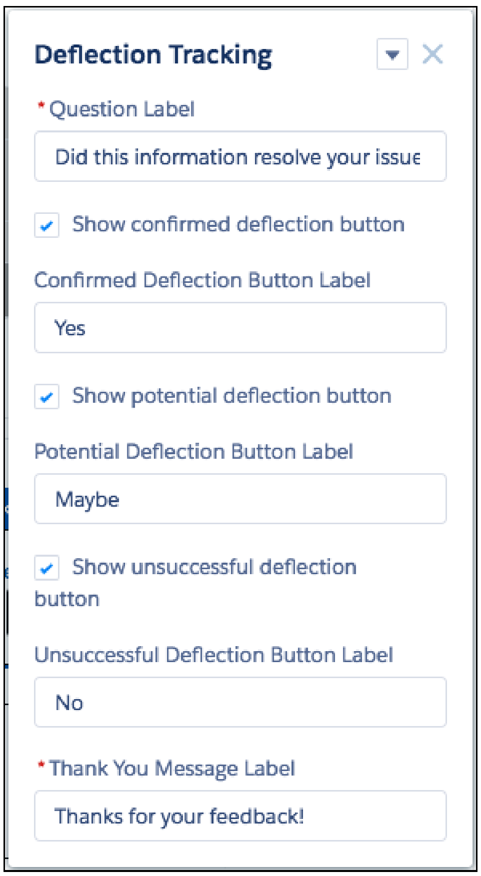
1. Select the **Deflection Tracking** component, and drag it onto any Feed Detail, Question Detail, or Article Detail page. Avoid placing the component in the template header or footer of the page. Doing so causes the component to appear on all pages.
2. In the property editor, configure properties for the component:

Property	Details
`Question Label`	Enter a prompt that asks users if they're satisfied with the suggested content. Default text is: **Did this information resolve your issue?**.
`Show confirmed deflection button`	Select to include a confirmed deflection button that users click to confirm that the information resolved their issue.
`Confirmed Deflection Button Label`	Enter a label for the confirmed deflection button. Default text is: **Yes**.
`Show potential deflection button`	Select to include a potential deflection button that users click to show that the information possibly resolved their issue.
`Potential Deflection Button Label`	Enter a label for the potential deflection button. Default text is: **Maybe**.
`Show unsuccessful deflection button`	Select to include an unsuccessful deflection button that users click to show that the information didn't resolve their issue.

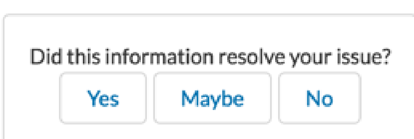
Property	Details
`Unsuccessful Deflection Button Label`	Enter a label for the unsuccessful deflection button. Default text is: **No**.
`Thank You Message Label`	Enter a message thanking the user for their response. Default text is:**Thanks for your feedback!**.

3. Publish the page.

Example: Sample Deflection Tracking component set up in Experience Builder:



Sample Deflection Tracking component in viewable user page:



Install the Salesforce Case Deflection Reporting Package to see how well the Deflection Tracking component actually deflects cases from being created. Use the Community Case Deflection Metrics dashboard to get metrics on potential and confirmed case deflections and the most helpful articles and discussions.

SEE ALSO:

Case Deflection

Community Case Deflection Metrics Dashboard and Reports

Ask Button

Contact Support & Ask Buttons

Tableau CRM Dashboard

Use the Tableau CRM Dashboard component to add Tableau CRM to your site's pages.

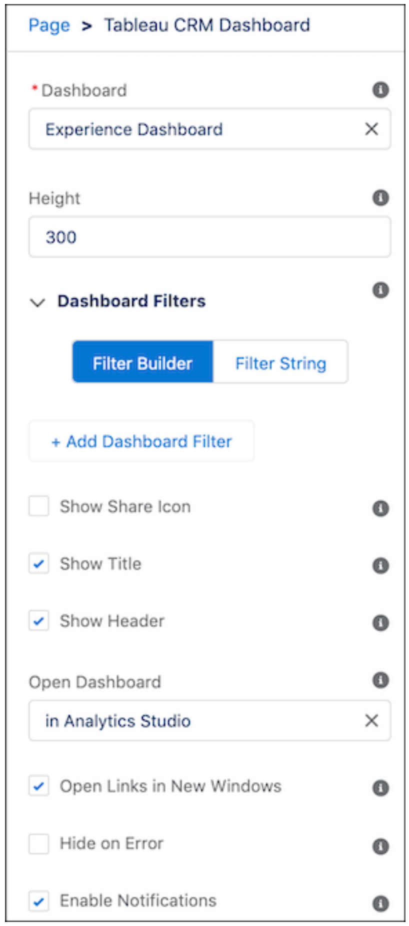
1. Select the **Tableau CRM Dashboard** component in the page you're configuring.
2. In the property editor, configure properties for the component:

Property	Details
`Dashboard`	Select an available dashboard from the dropdown list.
`Height`	Specify the height of the dashboard, in pixels. The default is 300.

`Filter`	Add selections or filters to apply to the dashboard when it appears on the page at runtime. You can filter dataset fields by variables or specified values. For filtering on dimensions, use this syntax:
	`{'datasets' : {'dataset1': [ {'fields': ['field1'], 'selection': ['$value1', '$value2']}, {'fields': ['field2'], 'filter': { 'operator': 'operator1', 'values': ['$value3', '$value4']}}]}}`
	For filtering on measures, use this syntax:
	`{'datasets' : {'dataset1': [ {'fields': ['field1'], 'selection': ['$value1', '$value2']}, {'fields': ['field2'], 'filter': { 'operator': 'operator1', 'values': [[$value3]]}}]}}`
	datasets takes dataset system names which are found in the left panel of the edit page for a dataset. (If your org has namespaces, include the namespace prefix and two underscores before the dataset system name.)
	fields takes dimensions or measures in the dataset. To find the names, click the Explore icon to open the widget, select Show SAQL from the Options menu.
	values can be specific values or fields in a Salesforce object To find the name of a field, go to Setup, locate the object you want, and select Fields. Use the Field Name (also known as the API name). For custom fields, use the name with "__c" at the end.
	With the **selection** option, the dashboard is shown with all its data, and the specified dimension values are highlighted. The selection option can be used alone or with the filter option. Selection takes dimension values only. To use this option, the dashboard must include a list, date, or toggle widget that groups by the specified dimension.

Property	Details
	With the **filter** option, the dashboard is shown with only filtered data. The filter option can be used alone or with the selection option. Filter takes dimension or measure values. Use **operator** with the filter option. Supported operators for dimensions: in; not in; matches Supported operators for measures: = ; >= ; > ; <= ; <.
`Show Sharing Icon`	Add the Share icon on the dashboard. When this option is selected, users can click the icon to open the Share dialog, where they can post to Chatter and download images and data. To show the Share icon, the minimum dashboard height is 612 pixels. Default is false.
`Show Title`	Control the visibility of the dashboard title. When this option is selected, the dashboard's title appears above the dashboard. Default is true.
`Show Header`	Control the visibility of the dashboard header. When this option is selected, the dashboard is displayed with a header bar that includes the Open in Analytics icon, the date and time that the dashboard's data was updated, and the dashboard views menu. Note that the header bar also appears if either Show Sharing Icon or Show Title is selected.
`Open Links in New Windows`	Specify where links from the dashboard to other assets are opened. When this option is selected, links open in new windows. When this option isn't selected, links open in the same window. Default is true.
`Hide On Error`	Control whether or not users see a dashboard that has an error. When this option is selected, if the dashboard has an error, it won't appear on the page. When this option isn't selected, the dashboard appears but doesn't show any data. An error can occur when a user doesn't have access to the dashboard or it has been deleted. Default is false.

Example: Tableau CRM Dashboard component:



Einstein Predictions

The Einstein Predictions component lets users display predictions and recommendations for a standard or custom object on an Experience Builder site page.

After a model is deployed, you can use it to display predictions and recommendations for a standard or custom object on an Experience Builder site page.

1. In Experience Builder, open the Experience Builder site page to which you want to add a prediction.
2. Drop the Einstein Predictions component where you want it on the page.
3. In the component configuration panel, use the **Prediction** lookup to find and select the prediction you want to embed in the site page.
4. Optionally, configure other settings for this prediction as well.

Setting	Description
Prediction	Search for a list of any predictions (deployed models) to which you have access.
Show Prediction Label	Select this checkbox to show the prediction label.

USER PERMISSIONS

To add the Einstein Predictions component to an Experience Builder site page

- Create and Set Up Experiences AND
- Is a member of the site

To view predictions on a site page

- View Einstein Discovery Recommendations

Setting	Description
Title	Descriptive label for the prediction.
Show title	Select this checkbox to show the title.
Prediction score unit	Unit of measure for the prediction. Examples: • Currency for money-based predictions • % for probability-based predictions • time interval for time-based predictions (hours, days, weeks, and so on)
Unit precedes score	Select this checkbox to show units preceding the prediction, such as currency symbols. By default, units follow the prediction.
Positive prediction label	Label to display when the prediction is higher than the threshold in a binary classification model. Examples: Win, Retain, Success, and so on.
Negative prediction label	Label to display when the prediction is lower than the threshold in a binary classification model. Examples: Loss, Churn, Fail, and so on.
Show top predictors	Select this checkbox to show the predictors with the highest impact on the prediction.
Collapse details	Select this checkbox to show top predictors but hide other details.
Include link to model card	Select this checkbox to show the **Learn about this model** link that users can click to see the model card associated with this prediction.
Show improvements	Select this checkbox to show Einstein Discovery suggestions on how to improve the predicted outcome.
Number of improvements to show	Set the maximum number of improvements returned on the prediction card.
Improvement threshold percentage	Specify a number to display only improvements that impact the predicted outcome by this percentage or higher.
Show values for predictors	Select this checkbox to show the impact value next to predictors and recommendations.
Show prediction warnings	Select this checkbox to show user warnings, such as: • missing fields that are required for the model • field values that are outside of the valid range used to build the predictive model
Calculate prediction as a date	Select this checkbox to show time-based predictions as based on a relative start date plus an offset value (the original prediction result).
Start calculating date prediction from	Select the date field to use for when to start calculating the predicted date.
Time period	Select the unit for the offset value (original prediction result) used to calculate the predicted date. • **Minutes** • **Hours** • **Days** • **Weeks**

Setting	Description
	• **Months**
Predicted date format	Select how to display the predicted date. • **Time Remaining** formats the prediction according to the selected **Time period**. • **Specific Date** formats the prediction as a date according to the logged-in user's locale settings.
Show prediction history starting from	Select a reference point to display score history: • **Last change** • **Last week**

When a user views this site page, predictions are updated in real time. No writeback to Salesforce is needed.

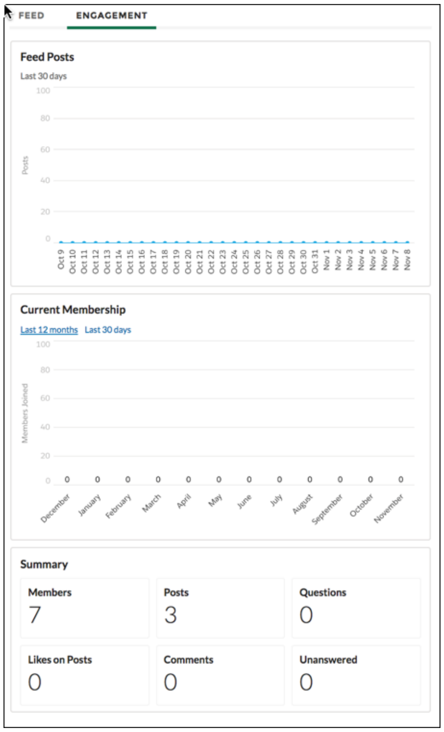
Engagement

The Engagement component displays charts related to member engagement in the Chatter group.

The Engagement component is visible only to users who have reporting permissions in orgs that have group engagement. You can also choose to make the component visible only to group managers.

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

Property	Details
`Group ID`	The group's ID. Typically, this field is populated when the page loads.

Example: 

Expanded Category Navigation

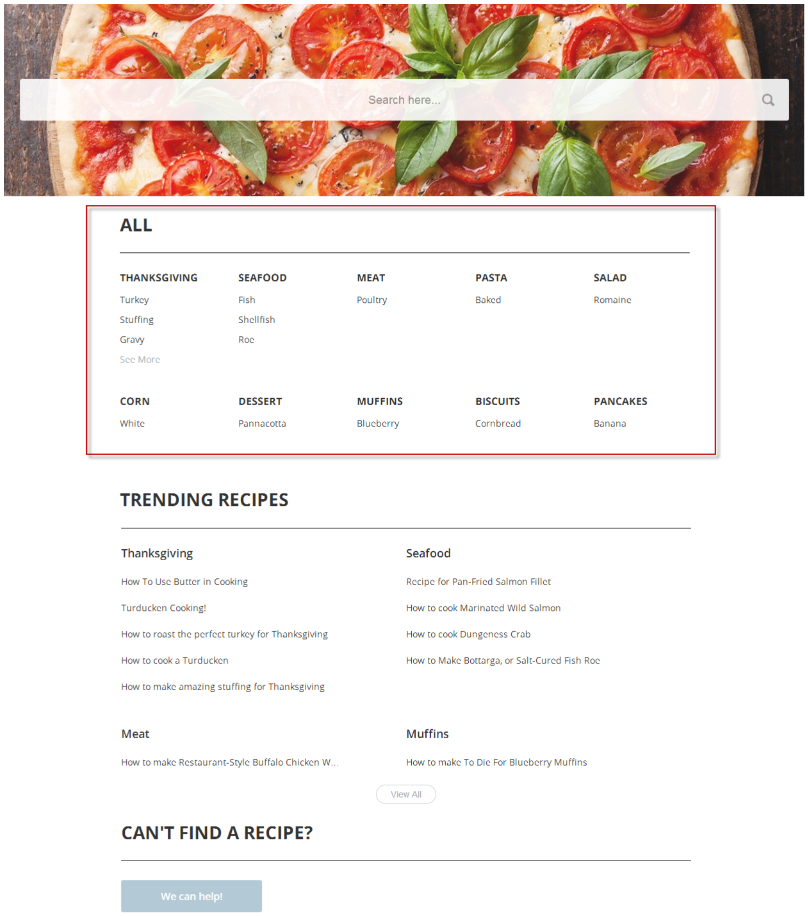
The Expanded Category Navigation component organizes articles based on a hierarchy of categories.

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

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

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

Example: Sample Expanded Category Navigation component:



SEE ALSO:

Which Components Can I Use with Each Aura Template?

Featured Data Categories

The Featured Data Categories component displays a group of data categories, with an image and title showing for each data category within the specified group. Images help your users select which group of articles they'd like to browse.

Before you begin, first upload image files to the Assets folder on the Overview tab of Site.com Studio. The recommended frame size for this image file is 480 x 480 pixels. The recommended file size is up to 400 KB.

Use the convention `<datacategoryname>-<size>.<filetype>` to name the image files, so that the system associates the correct image file with the data category of the same name. For Featured Data Categories, the file names for your images must match exactly the name of each data category and include a notation for square images (`s`):

<datacategoryname>`-s.jpg`

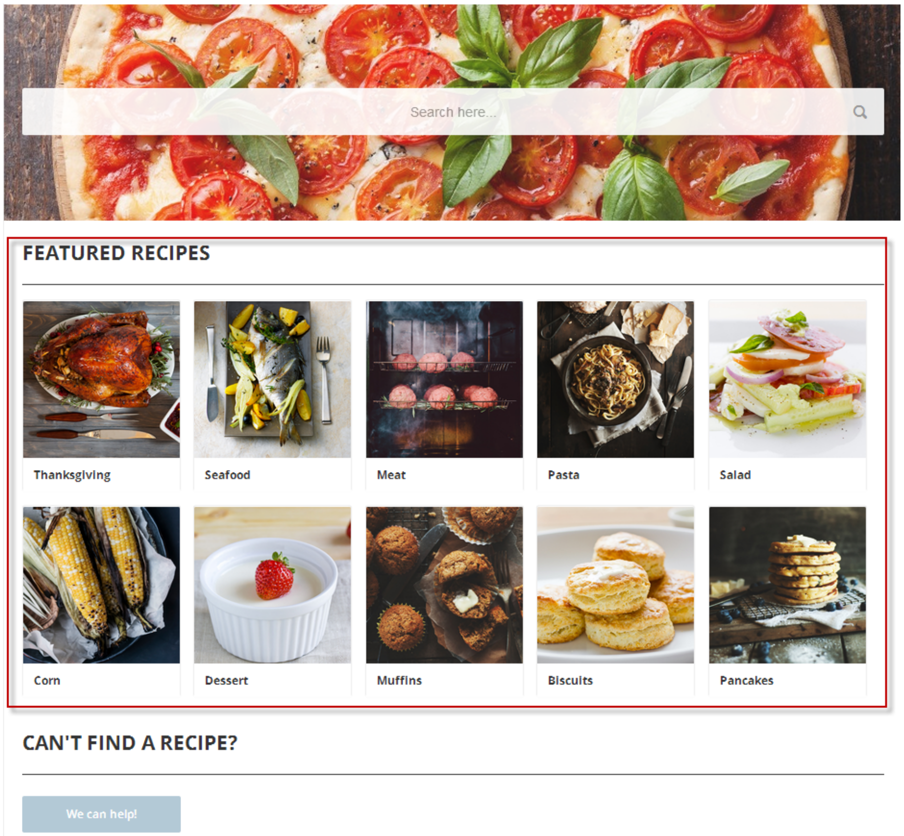
For example, for a data category with the name *Desserts*, the corresponding square image file is named `Desserts-s.jpg`.

Tip: Salesforce recommends .jpg format for image files and .png format for graphic art. To increase the speed at which pages load, use progressive JPEG compression whenever possible.

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

Property	Details
`Number of Data Categories`	Type the number of data categories to display from the group. Categories display in the order listed in the data categories group.
`Category Image URL`	Specify the relative URL to display the image associated with each data category using the expression `{!Global.PathPrefix}/{!DataCategory.Name}.jpg`. The expression maps directly to `<datacategoryname>-<size>` and displays images for the data categories in the order in which they are listed in the data category group. For subfolders, use the expression `{!Global.PathPrefix}/<Name of the Subfolder>/{!DataCategory.Name}.jpg`. For images from another source, use `http://<other source>/{!DataCategory.Name}.jpg`.
`Title`	Enter the title text for the list of featured data categories.

Example: Sample Featured Data Categories component:



SEE ALSO:

Which Components Can I Use with Each Aura Template?

External Account Hierarchy List Card

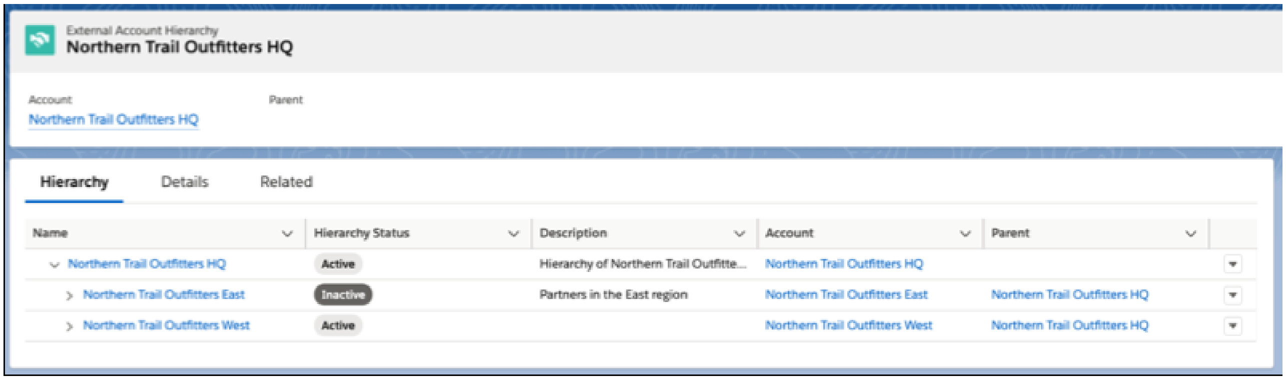
The External Account Hierarchy List card displays child and parent nodes within an external account hierarchy in list form. The hierarchical order of the accounts is represented by nested rows.

When you enable **Enable External Account Hierarchy** in Settings, external account hierarchies are available in your org.

1. Select the **External Account Hierarchy List Card** component on the page you're configuring.
2. In the property editor, configure properties for the component:

Property	Details
`Hierarchy Type`	The type of hierarchy that account are added to. The available values are `Partner` and `Customer`.

Example: Sample External Account Hierarchy component:



Featured Search

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

Before you begin, first upload image files to the Assets folder on the Overview tab of Site.com Studio. The recommended frame size for Featured Search component images is between 1280–2560 pixels wide by 175 pixels high. Images with an aspect ratio of 3:1 (wide and relatively short) provide the best results. The recommended file size is up to 1 MB.

Use the convention `<datacategoryname>-<size>.<filetype>` to name the image files, so that the system associates the correct image file with the data category of the same name. For Featured Search, the file names for your images must match exactly the name of each data category and include a notation for wide images (`w`):

`<datacategoryname>``-w.jpg`

For example, for a data category with the name *Desserts*, the corresponding wide image file is named `Desserts-w.jpg`.

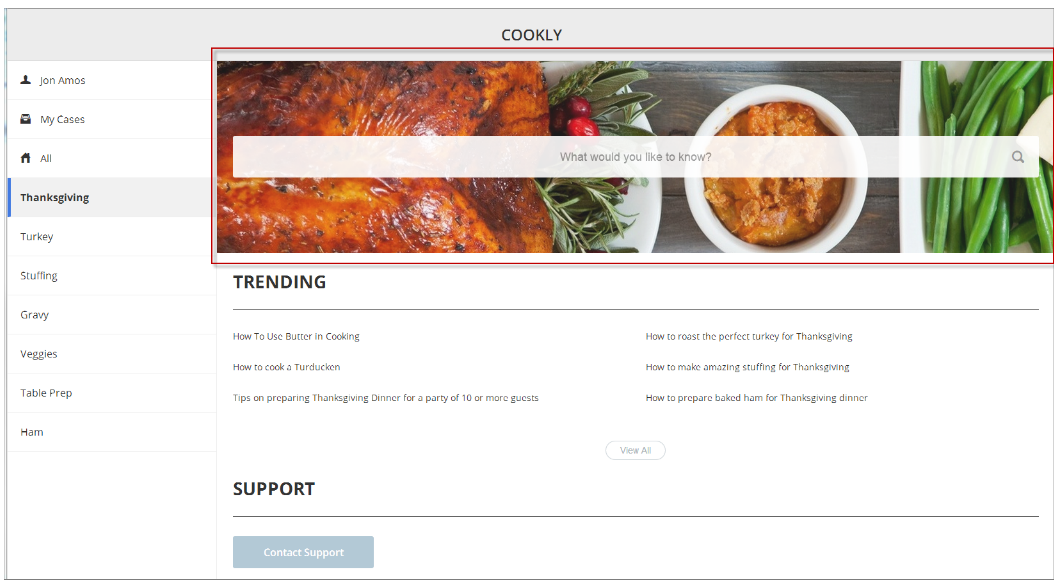
Tip: Salesforce recommends .jpg format for image files and .png format for graphic art. To increase the speed at which pages load, use progressive JPEG compression whenever possible.

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

Property	Details
`Placeholder Text`	Enter the text that appears in the search bar. The default text is `What would you like to know?`
`Category Name`	The top-level category that contains the subcategories for articles is automatically set using an expression that uses the top-level category you specified in the template's Custom Properties.
`Disable Background Image`	Select the checkbox if you don't want to display the background image for the category. The search box becomes smaller and more compact.
`Max Number of Auto Query Suggestions`	Enter the number of search queries to return per match.

Property	Details
`Max Number of Article Title Match Results`	Enter the maximum number of articles to return per match.
`Category Image URL`	Specify the relative URL to display the image associated with each data category using the expression `{!Global.PathPrefix}/{!DataCategory.Name}.jpg`. The expression maps directly to `<datacategoryname>-<size>` and displays images for the data categories in the order in which they are listed in the data category group. For subfolders, use the expression `{!Global.PathPrefix}/<Name of the Subfolder>/{!DataCategory.Name}.jpg`. For images from another source, use `http://<other source>/{!DataCategory.Name}.jpg`.

Example: Sample Featured Search component:



SEE ALSO:

Which Components Can I Use with Each Aura Template?

Featured Topics

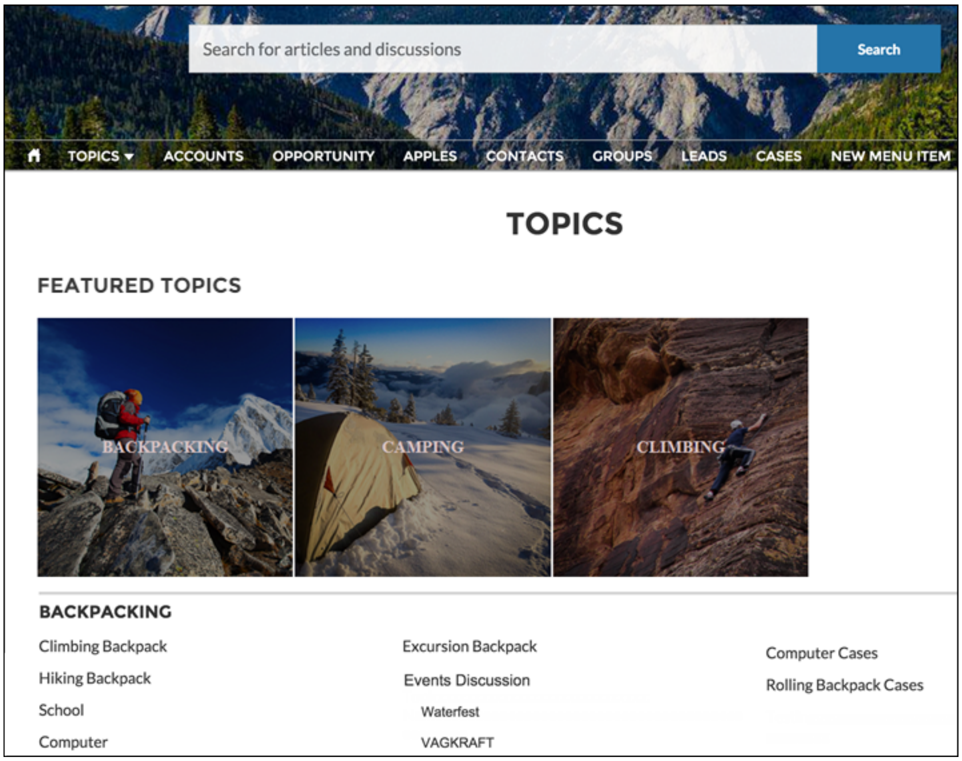
The Featured Topics component lets you place your Experience Builder site's designated featured topics and the images that represent them on any page.

1. From the Components list, select the Featured Topics component and drag it onto a page.
2. On the page, select the **Featured Topics** component.
3. In the property editor, configure properties for the component:

Property	Details
`Title`	Enter a title for the featured topics area. The default text is `Featured Topics`.
`Show Title`	Check to show the title. Clear to hide the title.
`Overlay Color`	The color to use as a wash over the tile background color. In the property's **rgba** field, the default is *`0,0,0,0.4`*.
`Overlay Hover Color`	The color to use as a wash over the tile background color when a user mouses over the tile. The link icon indicates that the value is taken from the site's theme. In Builder, you can test your hover color in Preview mode.
`Border Radius`	Slide to adjust the curve of featured topic tile borders. Note: If the component is in a narrow container, a round radius tends to look more oval. If you set border radius to *`50`*, very round, we recommend that you set Text Position to *`left`*, *`right`*, or *`center`*. The text background color is always rectangular, and placing text at the top or bottom of a circular tile truncates the background.
`Text Color`	Set the color of labels on featured topic tiles.
`Text Hover Color`	Set the color to use for a label when a user mouses over the tile. In Builder, you can test your hover color in Preview mode.
`Text Background Color`	Set the color to use for the tile background when it's inactive. In the property's **rgba** field, the default is *`0,0,0,0`*.
`Text Background Hover Color`	Set the color to use for the tile background when a user mouses over the tile. In the property's **rgba** field, the default is *`0,0,0,0`*. In Builder, you can test your hover color in Preview mode.
`Max Text Background Width`	Move the slider to control the width of the text background color. Width percentage is set against the full width of the tile. So 100% is the full width of the tile, rather than the full width of the browser page or the featured topic component. No matter what percentage you set, the text background width is always wide enough to support that label that sits on it.
`Text Position`	Select where to place text on a featured topic tile. • *`Top Left`* • *`Top Center`* • *`Top Right`* • *`Left`* • *`Center`* • *`Right`* • *`Bottom Left`* • *`Bottom Center`*

Property	Details
	• *Bottom Right*
`Text Alignment`	Set alignment of text within the text background. Select *Center*, *Left*, or *Right*. Note: Alignment changes can be less noticeable when text background is narrow or text is positioned at the top or bottom of the tile.

Example: Featured Topics on the Topic Catalog page.



SEE ALSO:

Set Up Featured Topics

Feed

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

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

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

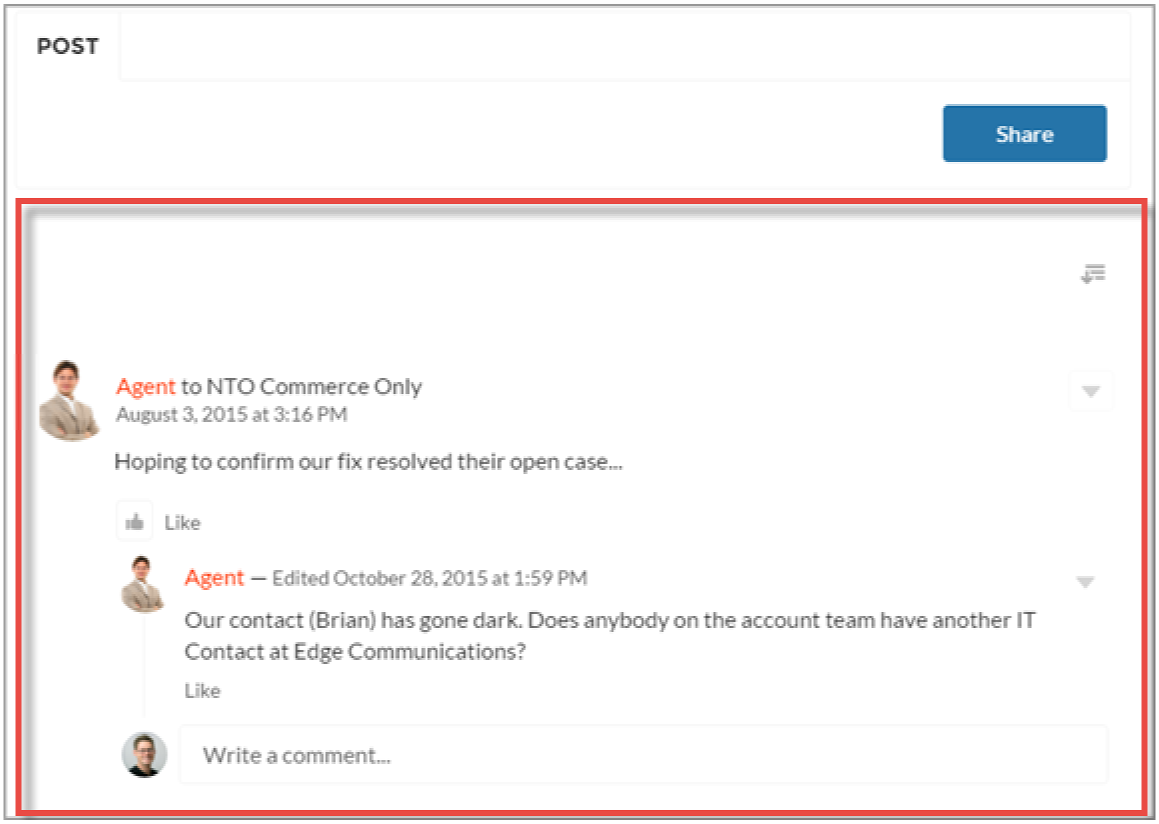
1. Select the **Feed** component in the page you're configuring.
2. In the property editor, configure properties for the component:

Property	Details
`Feed Type`	Select the type of feed you'd like to place on your page. Types include: • `Group or Record`—Group or Record feed shows everything that is posted to a selected group or record, like an account or opportunity. • `Discussion`—Discussion feed shows everything that is posted to Navigational Topics. • `My Feed`—Shows feed items that are tagged with a topic, or a person or record that you follow. My Feed also shows all of your personal site activity. You see all shared feed items unless another person shared the item with a group that you aren't a member of. With public groups, you see the feed item that you shared despite not being a member. • `Topic`—Topic feed shows everything that is posted to a selected topic. • `User Profile`—User Profile feed shows everything that is posted for user profile feeds. • `Bookmarks`—Bookmarks feed shows everything that is posted for a selected bookmark. Search isn't supported on the `Topic` feed type. If you plan to make your feed searchable, select the `Group or Record` feed type.
`Record ID`	The feed item ID. Typically, this field is automatically populated when the page loads. Leave this field blank if you pick the Discussion or My Feed options in `Feed Type`.
`Default Filter`	For feed entries that you want your site members to see, select the default filter.
`Default Sort Order`	The default sort order for the `Discussion` and `Topic` feed types. Presents site members and guests with the initial experience that you intend. If users choose to change the sort order in their view, their selection sticks.
`Post Style`	Choose to expand or collapse post comments by default.
`Let members search feeds`	Choose to let site members search an individual feed. Search isn't supported on the `Topic` feed type.
`Let members sort feeds`	Choose to let site members sort a feed. When sorting is enabled, members can sort a feed by the latest posts or most recent activity.

Example:

Note: Users who unfollow topics, users, or records stop seeing posts regarding those topics users or records from the time they unfollow. Older posts about those topics, users, or records are still visible on the feed.

Sample Feed component



Each feed type comes with a set of filters for limiting what's shown in the feed. This table lists and describes filter types, and it pairs filters with the feeds where they're available.

Note: The Bookmarks feed doesn't have any filters.

Filter Name	Description	Feed Types
All Updates	Shows all posts in a feed. No comments are show. Click a post's date and timestamp to navigate to its detail view. The detail view includes all comments on the post.	• Group or Record • My Feed • User Profile
All Questions	Shows all the questions in the feed.	• Discussion • Group or Record • My Feed • Topic
Questions with Best Answer	Shows all questions with an answer that is marked as best.	• Discussion • Group or Record • My Feed • Topic

Filter Name	Description	Feed Types
Questions with No Best Answer	Shows all questions with answers, none of which is marked as best.	• Discussion • Group or Record • My Feed • Topic
Unanswered Questions	Shows the questions that aren't answered.	• Discussion • Group or Record • My Feed • Topic

SEE ALSO:

Which Components Can I Use with Each Aura Template?

Feed Compact

Use the Feed Compact component to add a compact, scannable version of a feed to an object. Object types that take a compact feed include a record, a topic, a group, a user profile, or an overall site discussion. Feed Compact only shows questions in a feed, and is only recommended if the only feed type used is a question. The component provides a chronological list of questions made with the Feed Publisher component.

Compact feeds initially show only parent-level feed posts. Clicking a post takes you to the expanded post and all its related comments.

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

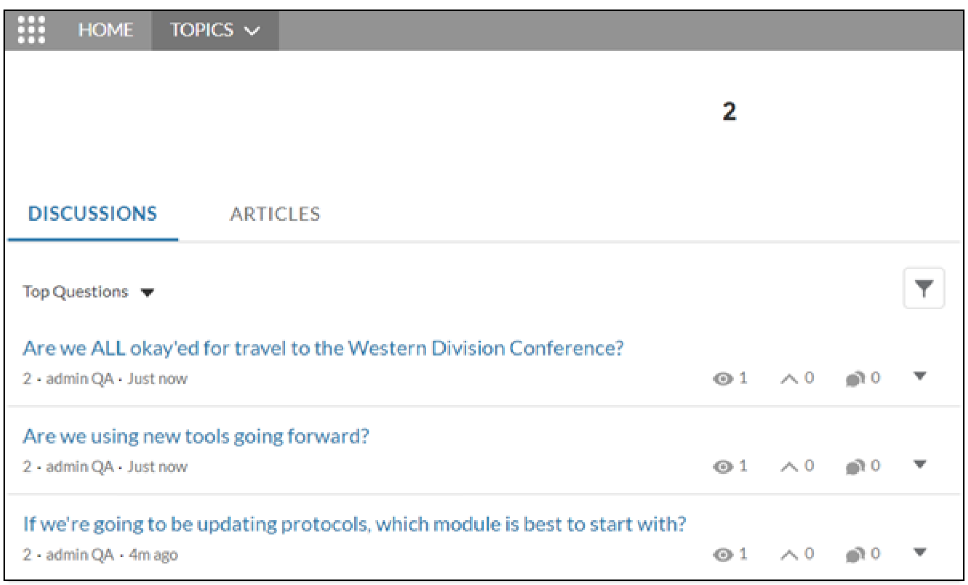
Property	Details
`Show Views`	Select to show the number of times an item is viewed 2. A view is counted when an item is liked, commented on, or its detail view is opened. Clear to hide the view count.
`Show Likes`	Select to show the number of likes for each post. Clear to hide the number of likes.
`Show Comments`	Select to show the number of comments for each post. Clear to hide the number of comments.
`Compact Feed Type`	Select the object or context you want to associate this feed with. Discussion—Shows all questions tagged with a navigational topic, for example `#Q4wins`. Users don't have to follow a navigational topic to see it in the discussion. And feed items that discuss the topic but don't have the tag don't appear in the discussion, even to users who follow the topic. Shared feed items appear in a Discussion feed only if the question posted with the shared item (the share message) includes the topic tag. Even if the shared item has a tag, it doesn't appear in the feed if the tag isn't included in the share message. • Group or Record—Shows all questions created on a record or in a group. • My Feed—Shows questions that are tagged with a topic, or person or record that you follow. My Feed also shows all questions related to your personal site activity. You see all

Property	Details
	shared feed items unless another person shared the item with a group that you aren't a member of. With public groups, you see the feed item that you shared despite not being a member. • Topic—Shows all questions that are tagged with the topic. Shared questions appear in a Topic compact feed only if the message posted with the shared item (the share message) includes the topic tag (for example, `#Q4wins`). Even if the shared item has a tag, it doesn't appear in the feed if the tag isn't included in the share message. • User Profile—Shows your personal site activity in terms of questions. • Bookmarks—Shows questions that you bookmarked.
`Entity Id`	The feed item ID. Typically, this field is automatically populated when the page loads. Leave this field blank if you pick the Discussion or My Feed options in `Compact Feed Type`.
`Default Sort Order`	The default sort order on a feed. Presents site members and guests with the initial experience that you intend. If users change the sort order in their view, their selection sticks.

Example:

Note: Users who unfollow topics, users, or records stop seeing posts regarding those topics users or records from the time they unfollow. Older posts about those topics, users, or records are still visible on the feed.

Sample Feed Compact component



Feed Compact comes with a set of filters for limiting what's shown in the feed. This table lists and describes Feed Compact filter types.

Filter Name	Description	
All Questions	Shows all questions in a compact feed. No answers are show. Click a question or its date-and-time stamp to navigate to its detail view. The detail view includes all answers to the question.	
Unanswered Questions	Shows all questions that aren't answered.	
Questions with No Best Answer	Shows all questions with answers, none of which is marked as best.	
Questions with Best Answer	Shows all questions that have an answer that's marked as a best answer.	

SEE ALSO:

Which Components Can I Use with Each Aura Template?

Feed History

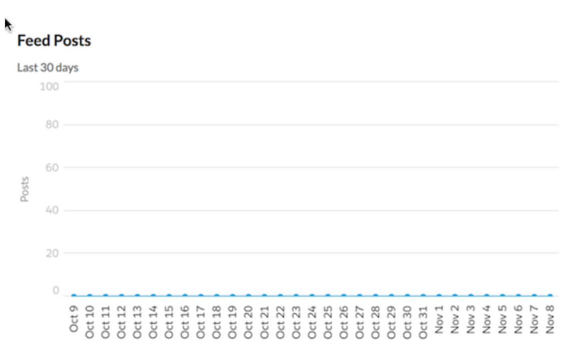
The Feed History component displays the number of posts per day in the past 30 days.

The Feed History component is visible only to users who have reporting permissions in orgs that have group engagement. You can also choose to make the component visible only to group managers.

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

Property	Details
`Group ID`	The group's ID. Typically, this field is populated when the page loads.

Example:



Feed Post & Comments

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

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

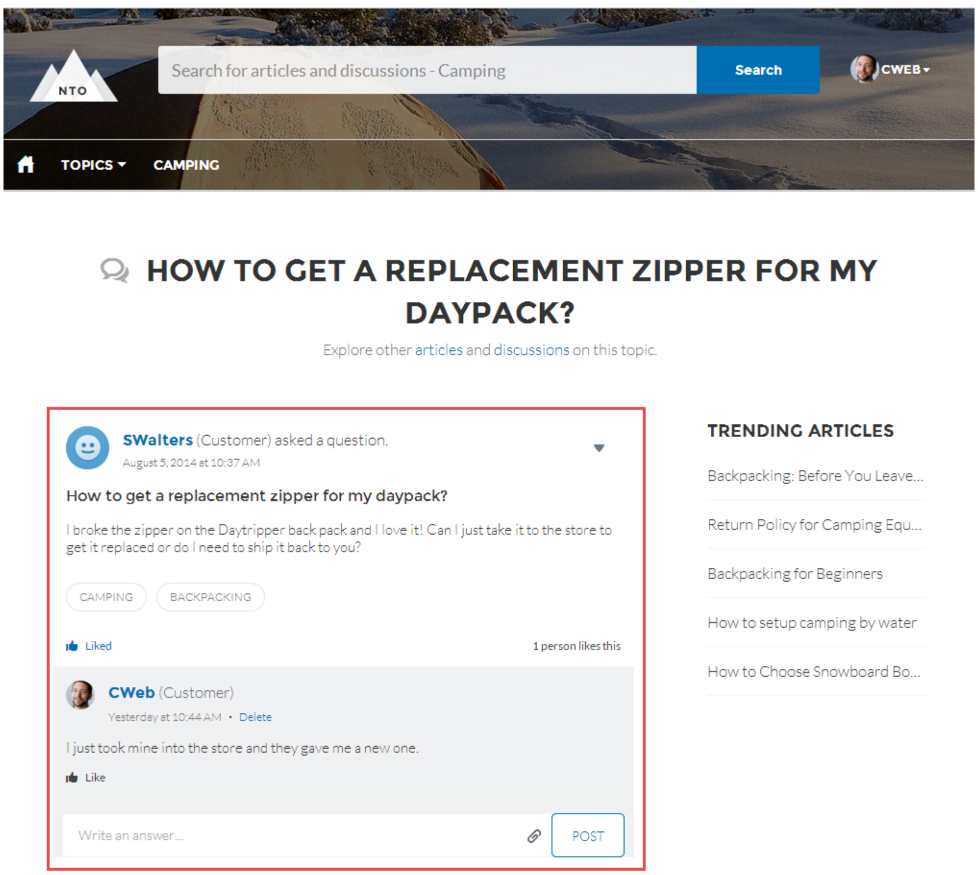
Only users who are logged in can post an answer to a question. Users can attach a file to a question or answer post by clicking the paperclip icon. They can choose to **Select a File** from files already uploaded to the site or **Upload a File** from the user's local drive.

Once an answer is posted, users can click at the top right corner of the post to edit, bookmark, delete, or flag the post. Also, users can edit the topics associated with the post. The editing and flagging features must be enabled for the site.

1. Select the **Feed Post & Comments** component in the page you're configuring.

   There are no properties to set for this component.

Example: Sample Feed Post & Comments component:



SEE ALSO:

Which Components Can I Use with Each Aura Template?

Feed Publisher

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

The Feed Publisher offers a way to add content to a site feed. It works together with the Feed and Feed Compact components. When site members create posts using the Feed Publisher, the posts are displayed in the related Feed or Feed Compact component on the page.

Note: The way the Feed Publisher component appears in Experience Builder mobile preview mode can differ from the way it appears in display mode. For example, let's say in Setup an admin adds actions to the global publisher layout. They add New Task, New Event, and Log a Call. Those actions appear in preview mode for both the desktop and mobile views of the publisher. But, after you publish your changes, the actions appear only in the desktop view, not in the mobile view. Only the Post action is available in both views.

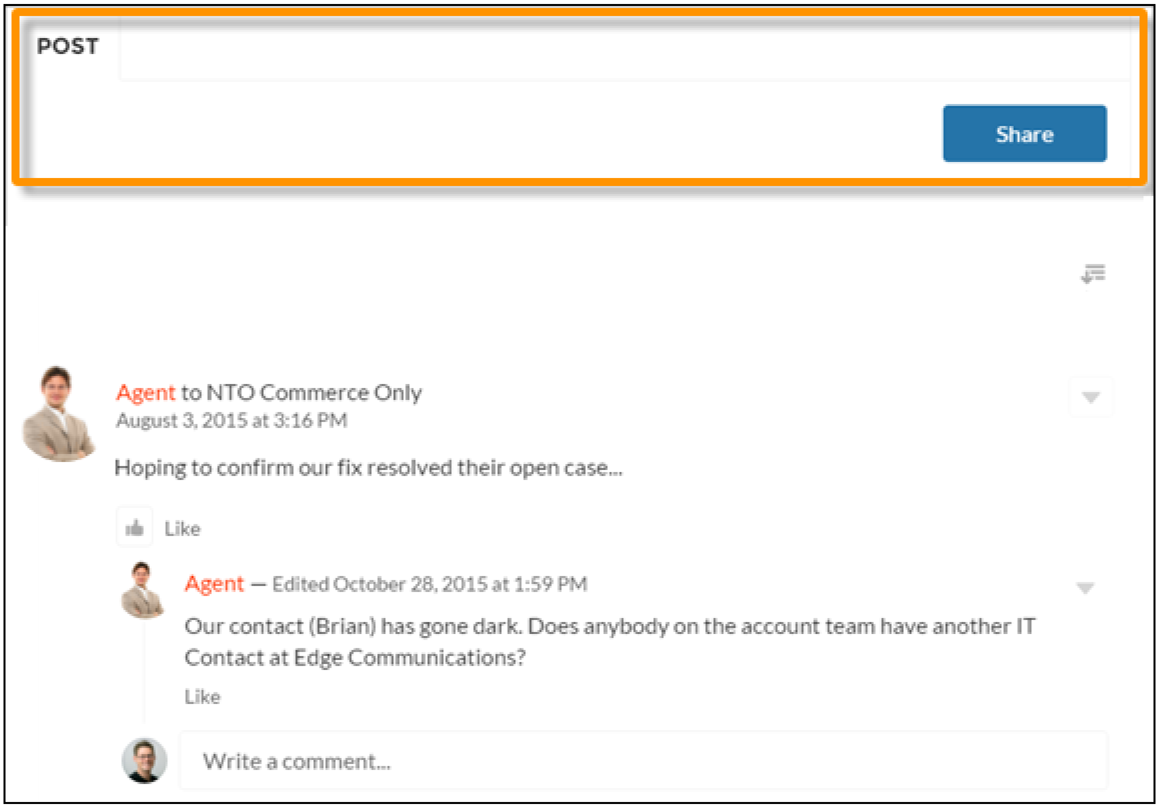
By default, the Feed Publisher lets users attach any supported file type up to 2 GB per file. For best performance, inline images up to 25 MB per image are recommended. Inline images over 25 MB appear at full size, and can be slow to load.

Note: Copying inline images from external sources and pasting them into the text editor is not supported.

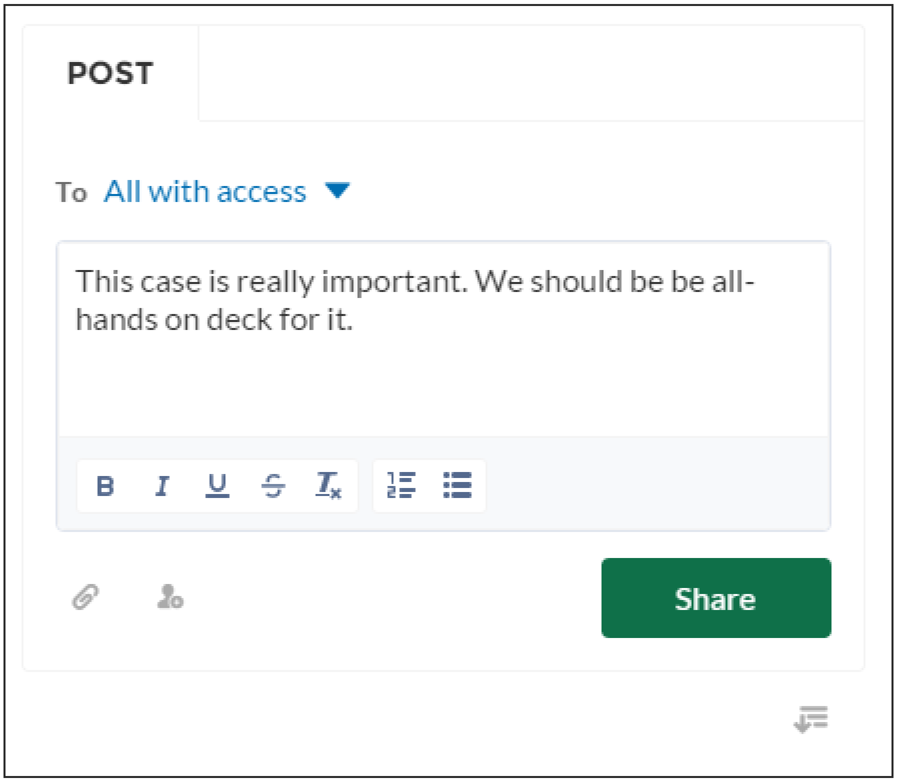
1. Select the **Feed Publisher** component in the page you're configuring.
2. In the property editor, configure properties for the component:

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

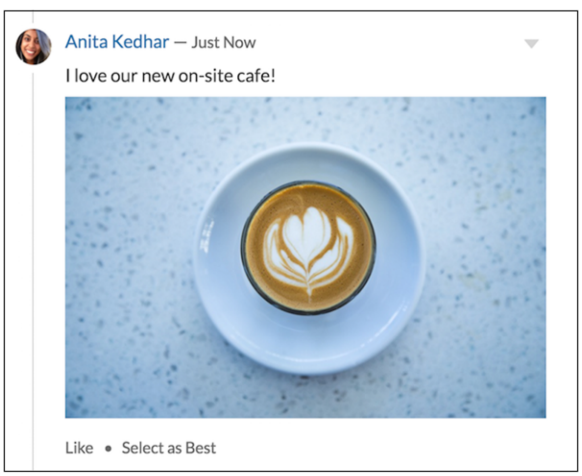
Example: Sample Feed Publisher component, wide layout



Example: Sample Feed Publisher component, narrow layout



Example: Sample feed post with inline image



SEE ALSO:

Which Components Can I Use with Each Aura Template?

Files List

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

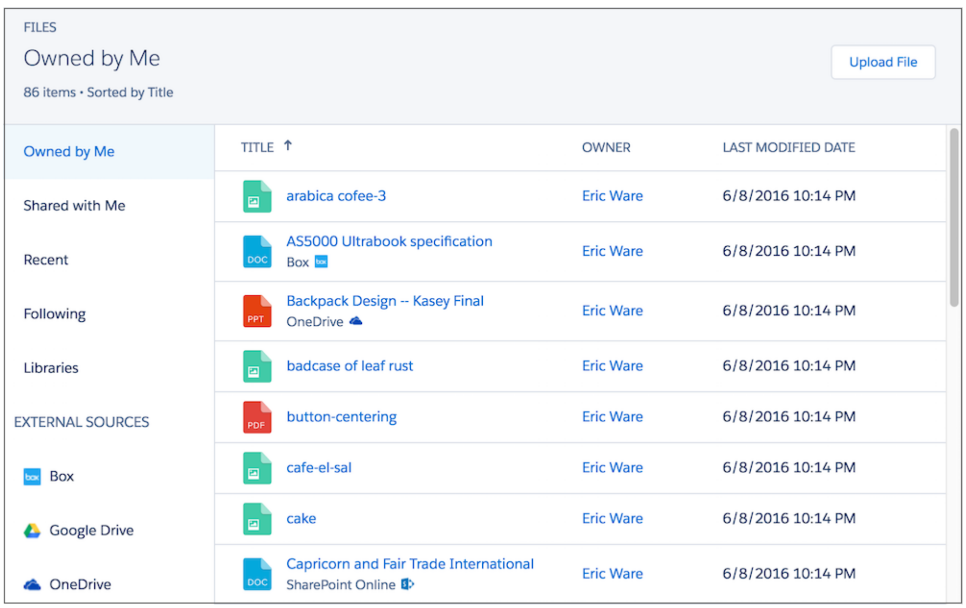
Members can upload, sort, and filter files using the files list. Clicking a file opens the file previewer, where members can upload a new version, download, and delete the file. Filters in the left sidebar show different selections of files. The Libraries filter shows files from Salesforce CRM Content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

Note: A preview thumbnail is an easy way to find files in mobile and tablet views. A thumbnail view is not yet available for desktop.

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

Property	Details
`Files List`	Modify the number of records that display in the window, from 10 to 100. A scrollbar appears to let users scroll to see more records

Example: Sample Files List component, wide layout



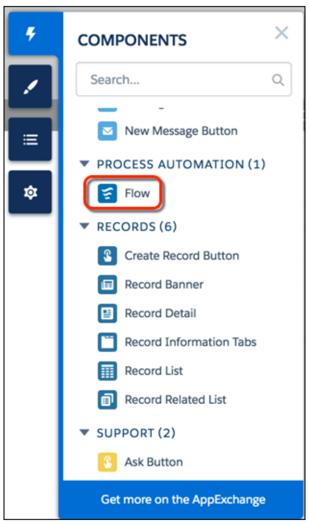
Flow

Flows automate business processes to collect, update, edit, and create Salesforce information. With the Flow component in Experience Builder, you can add flows to your pages. Add the Flow component to your site pages just like any other component.

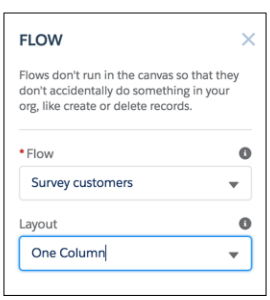
Note:

- Flows in Experience Builder sites are supported through the Flow and Suggested Actions components.
- Flow creators can overwrite error messages with their own content.

1. Build a flow in Flow Builder.
2. Activate the flow.
3. Drag the Flow component into position on your site page.



4. In the property editor, select the flow you want to use and any other properties.



Flow
Only active screen flows are available. Flows that were built in the Desktop Flow Designer aren't supported.

Layout
By default, flows display in one column.

USER PERMISSIONS

To create an Experience Cloud site:

- Create and Set Up Experiences AND View Setup and Configuration

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences
- OR
- Be a member of the site AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences
- OR
- Be a member of the site AND an experience admin or publisher in that site

To run a flow in an Experience Builder site

- Run Flows

Note: If a screen contains a Section screen component, that screen ignores the Layout property.

Input variables

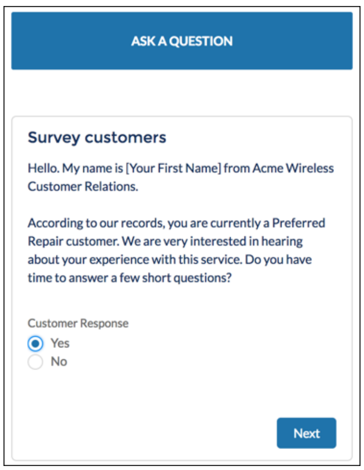
If you see other properties, they are the flow's input variables. Variables appear only if they allow input access.

Pass record ID into this variable

This option is available only for Text input variables in Record pages. For simplicity, we recommend passing the ID to only one variable.

For example, when this component is embedded in an Opportunity Record page, at run time the component passes the opportunity's ID into the selected input variable.

Example: Here's a flow called Survey customers in a site.



SEE ALSO:

[Which Components Can I Use with Each Aura Template?]
[Build a Flow]
[Two-Column Flow Considerations]
[Customize the Error Message for Running Flow Users (Best Practice)]
[*Lightning Aura Components Developer Guide*: Create Custom Component for Guest User Flows]

Allow Guest Users to Access Flows

Allow guest users to access flows within a site to create multi-part registration forms, decision trees, and conditional screens tailored to unauthenticated users. Flows give your guest users more flexibility to accomplish tasks and provide information before they have to register.

To allow guest user access from Experience Builder:

1. Go to **Settings**.
2. On the General tab, select **Public can access the site** and then click the guest user profile.
3. Under System Permissions, turn on the **Run Flows** permission.

   Note: The Run Flows permission is removed from new orgs starting in the Winter '21 release for the Guest User and Experience Cloud External User profiles. The permission will be removed from all orgs starting in the Summer '22 release. To avoid future access issues, we recommend updating your existing sites to the new permission structure before the Summer '22 release. For more information, see How Does Flow Security Work?

Note: To use Guest User Flows for login or self-registration, demonstrated in the example below, a developer must create a Lightning component that implements `lightning:availableForFlowsScreens`. They must also create an Apex controller for that component that uses the API exposed on the site object.

To add a flow to your login page from Experience Builder:

1. Go to the Login page and add the Flow component.
2. In the properties panel, select a predefined flow and a layout.
3. Edit the audience and assign it to Guest.
4. Delete the Login Form component.

EDITIONS

Available in: **Salesforce Classic** and **Lightning Experience**.

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** editions.

USER PERMISSIONS

To create, customize, or publish a site:
- Create and Set Up Experiences AND View Setup and Configuration

SEE ALSO:

Which Components Can I Use with Each Aura Template?

Lightning Aura Components Developer Guide: Create Custom Component for Guest User Flows

Follow Button

The Follow Button component lets users follow topics, articles, and other users.

In the Page Editor, you can configure the follow button component on the User Profile, Article Detail, and Topic Detail pages. This component lets users follow other users, articles, or topics. When a user views their own profile, the button isn't visible because users can't follow themselves.

Each button instance supports its own property values. So, if you have two Follow buttons on a page, the values on each button are unique to that button. You can configure buttons to use the values you defined in your theme so that they all look the same. But each button instance remains unique.

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

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

Property	Details
`Allow email notifications on topics`	Select to let user's receive email notifications for topic activity.
`Button Text Color`	Set the color of text that's used for the button label. Note: The link icon shows that the current selection comes from colors defined in the theme.
`Button Text Hover Color`	Set the color of text that's used for the button label when a member mouses over the button. In Builder, you can test your hover color in Preview mode.
`Button Background Color`	Set the color to use for the button background when the button is inactive.
`Button Background Hover Color`	Set the color to use for the button background when a member mouses over the button. In Builder, you can test your hover color in Preview mode.
`Button Border Color`	Set the color to use for the border that surrounds the button.
`Button Border Radius`	Move the slider to control the amount of curve to use for the button shape.
`Max Button Width`	Move the slider to control the width of the button. Width percentage is set against the full width of the container the button sits in. So 100% is the full width of the container, rather than the full width of the browser page.
`Button Alignment`	To set the horizontal alignment of a button within its container, select *`Center`*, *`Left`*, or *`Right`*.

Example: 

Note: Turn on Feed Tracking for each article type you want members to follow.

SEE ALSO:

Which Components Can I Use with Each Aura Template?

Global Search Box

The Global Search component lets you expose global search in your site. Let your users search for any object available to them.

Autocomplete search results are based on the most recently used objects and records by the user, same as global search in your org. The search accounts for partially matching terms and non-adjacent terms.

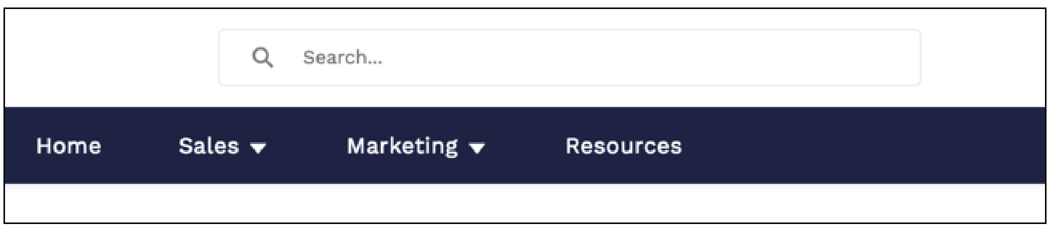
1. Select the **Global Search Box** component in the page you're configuring.

   In the Partner Central template, for example, this box is on the Home page.

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

Property	Details
`Placeholder Text for Search Field`	Specify the text that appears in the search box. The default text is Search...
`Objects in Autocomplete Results`	Click **Add** to add searchable Salesforce objects to your site's autocomplete results. To edit an object, click the object name. In the edit window, you can change to another type of object and you can mark the object as **Publicly available**. To select a different object type, click the object name and select from the list. To make results of that object type available to guest users, select **Publicly available**.
`Maximum Autocomplete Results`	Enter the maximum number of autocomplete results displayed to the user during a search. The default is `5`.

Example: Sample Global Search Box component in Partner Central:



With global search from your internal org, you can get uneven results when searching for a site User record. Here's why and what you can do about it. Each site has a unique network ID. When you create a site user through **Contact record** > **Create External User**, the new User record is assigned to a site's network ID.

Global search looks for records in the internal org, which has a different network ID than the site. A global search doesn't search inside sites. Since the User record is associated with a site network ID, global search doesn't return results for that record.

The workaround is to create User records in the internal org, and then associate the records to a site. You can associate an internal User record to a site by linking the internal record to a Contact record. After you forge the link, you can find the User record through global search. The User record's network ID is now associated with the internal org.

SEE ALSO:

Which Components Can I Use with Each Aura Template?
Enable Search Autocomplete for Guest Users

Global Search for Peer-to-Peer Communities

Global Search for Peer-to-Peer Communities lets your users search for articles, discussions, and any object available to your site members and made searchable. The component is separate and distinct from the overall header, making it easy to customize to a site's needs.

Autocomplete search accounts for partially matching terms and non-adjacent terms.

1. In the page that you're configuring, select the **Global Search for Peer-to-Peer Communities** component.
2. In the property editor, configure properties for the component:

Property	Details
`Placeholder Text for Search Field`	Enter the text that appears in the search box. The default text is Search...
`Autocomplete Search`	Click to expand the section with autocomplete search properties.
`Use autocomplete in searches`	Select to let users see suggested search results as they type search terms.
`Maximum Autocomplete Results`	Enter the maximum number of suggested results displayed on each tab during a search. The default is 6. An equal number of questions, articles, and objects is displayed in the combined results tab. If a type doesn't have enough results, results of other types are displayed to reach the maximum number. This functionality is available only in the Winter '16 and later versions of Experience Builder templates.
`Limit autocomplete search results to Discussions and Articles`	Select to show only discussions and articles in autocomplete results.
`Objects in Autocomplete Results`	Click **Add** to add searchable Salesforce objects to your site's autocomplete results. To edit an object, click the object name. In the edit window, you can change to another type of object and you can mark the object as **Publicly available**. To select a different object type, click the object name and select from the list. To make results of that object type available to guest users, select **Publicly available**.
`Ask Experience`	Click to expand the section with properties regarding asking the site.
`Show footer during search`	Select to display the footer that gives members an option to ask the site a question.
`Post to Ask the Experience`	Enter the text that invites users to post a question to the site or to customer support. The default is: Don't see what you're looking for?
`Create Your Question Prompt`	Enter the text that users click to ask a question. The default is: Ask a question.
`Create Your Sign-In Prompt`	Enter the text that directs users to a login page before they ask a question. The default is: Sign in to ask a question.
`Allow members to add topics`	Select to show a topic area at the bottom of the question and to allow members to add topics.
`Expand Details section by default`	Show the full question Details section. Users can collapse and expand this section as they choose.

With global search from your internal org, you can get uneven results when searching for a site User record. Here's why and what you can do about it. Each site has a unique network ID. When you create a site user through **Contact record** > **Create External User**, the new User record is assigned to a site's network ID.

Global search looks for records in the internal org, which has a different network ID than the site. A global search doesn't search inside sites. Since the User record is associated with a site network ID, global search doesn't return results for that record.

The workaround is to create User records in the internal org, and then associate the records to a site. You can associate an internal User record to a site by linking the internal record to a Contact record. After you forge the link, you can find the User record through global search. The User record's network ID is now associated with the internal org.

SEE ALSO:

Which Components Can I Use with Each Aura Template?
Enable Search Autocomplete for Guest Users

Global Search Results

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

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

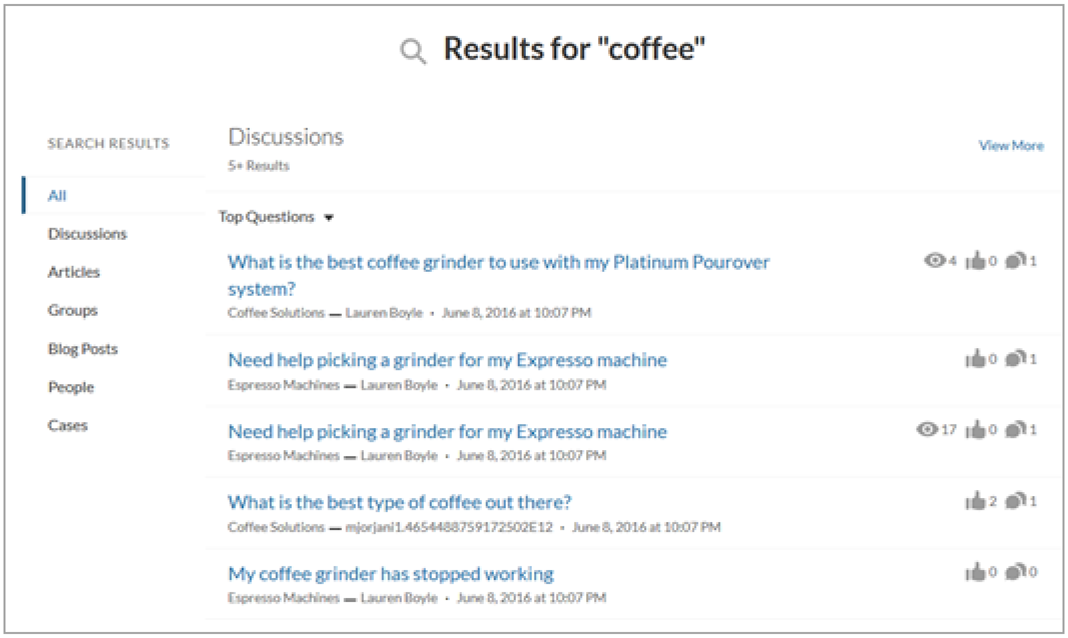
Property	Details
`Search Term`	The system supplies this search term to search across the site.
`Show the All results tab`	To show search results in one list under All, check the box.
`Allow search results filtering`	To allow search result filtering, check the box.
`Object`	Add or remove tabs to customize which lists search results are displayed in.
`Publically Available`	To make the object publicly available for all users, including Guest users, check the box.
`Show search results from all feeds, including questions, posts, and comments`	For Discussions objects only. To show expanded search results from all Chatter feeds, check the box. Search results from all feeds use the expanded feed, rather than the compact feed.

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

Example:

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

Global Search Results shown in the site:



With global search from your internal org, you can get uneven results when searching for a site User record. Here's why and what you can do about it. Each site has a unique network ID. When you create a site user through **Contact record** > **Create External User**, the new User record is assigned to a site's network ID.

Global search looks for records in the internal org, which has a different network ID than the site. A global search doesn't search inside sites. Since the User record is associated with a site network ID, global search doesn't return results for that record.

The workaround is to create User records in the internal org, and then associate the records to a site. You can associate an internal User record to a site by linking the internal record to a Contact record. After you forge the link, you can find the User record through global search. The User record's network ID is now associated with the internal org.

Note: In a B2B Commerce store, when configuring the types of results to return with a Global Search, don't include Product2 type objects. Global Search doesn't respect the store's user entitlements. So buyers could see products that they're not entitled to see. The Results Layout component respects user entitlements. You can use Results Layout for products and Global Search for things like cases, articles, and feeds.

SEE ALSO:

Which Components Can I Use with Each Aura Template?
Set Up and Manage Salesforce Search
Troubleshoot Common Search Issues

Group

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

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

Note:

- Add the Add Member action to the group publisher for users to access it from the banner.

- For optimal display, choose a wide column width when using this component on a custom page.

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

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

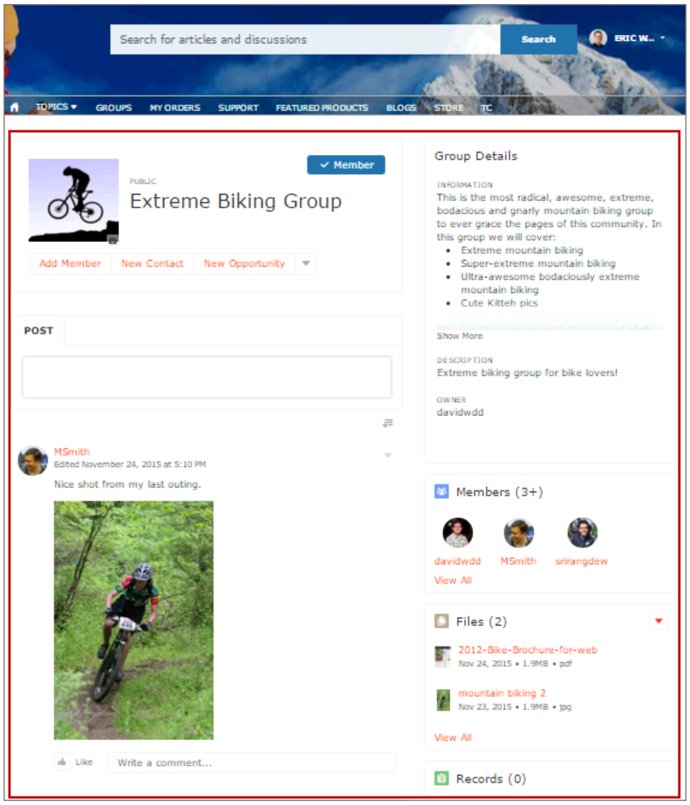
2. In the property editor, configure properties for the component:

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

Example:

Warning: Avoid spamming new group members in a community, especially if you are adding group members en masse. Deselect the following org-wide Chatter email notifications: **Allow Emails** and **Allow Posts via Email**. Access these settings by searching *`Email Settings`* in the **Quick Find** search box in Salesforce Setup.

Sample Group component:



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

SEE ALSO:

Which Components Can I Use with Each Aura Template?

Group Banner

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

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

Note:

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

1. Select the **Group Banner** component on the page you're configuring.

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

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

Example: **Sample Group Banner component**

SEE ALSO:

Which Components Can I Use with Each Aura Template?

Group Detail

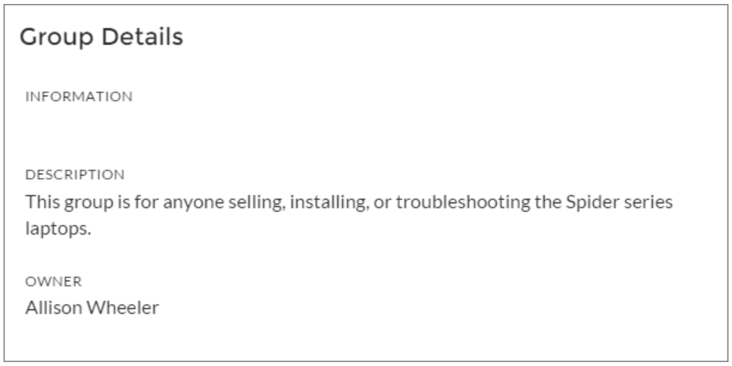
Use the Group Detail component on custom group detail pages for your site. This component displays the content from the group description and information fields along with the name of the group owner.

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

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

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

Example: **Sample Group Detail component**



SEE ALSO:

[Which Components Can I Use with Each Aura Template?]

Group Related List

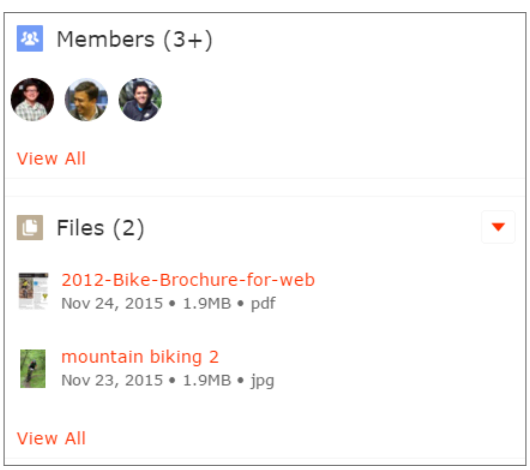
Use the Group Related List component on custom group detail pages for your site. This component displays the group files, members, and records.

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

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

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

Example: **Sample Group Related List component**



SEE ALSO:

Which Components Can I Use with Each Aura Template?

Headline

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

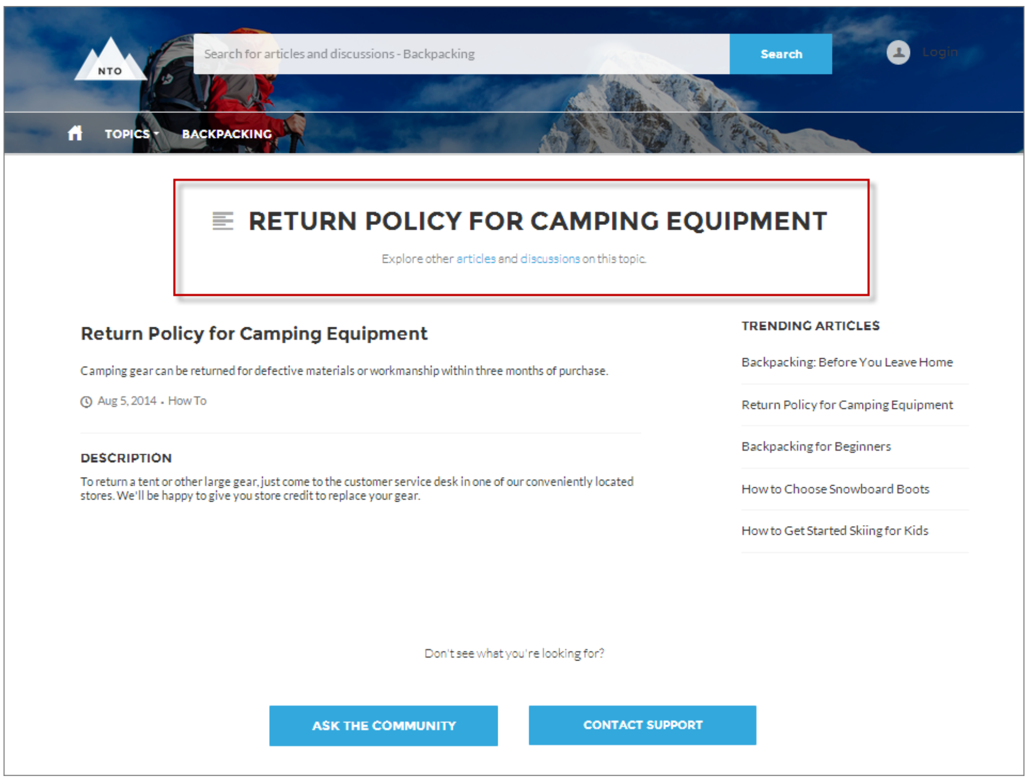
1. Select the **Headline** component in the page you're configuring.
2. In the property editor, configure properties for the component:

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

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

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

Example: Sample Headline component:



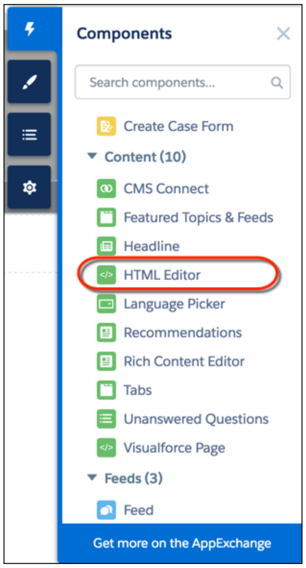
SEE ALSO:

Which Components Can I Use with Each Aura Template?

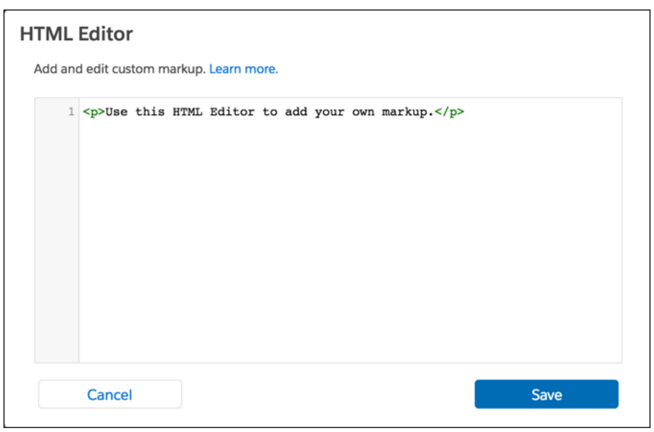
HTML Editor

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

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



2. Add and format HTML content.



EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

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

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

Attributes: abbr, accept, accept,-charset, accesskey, action, align, alink, allowfullscreen, alt, autocomplete, axis, background, bgcolor, border, cellpadding, cellspacing, char, charoff, charset, checked, cite, class, classid, clear, code, codebase, codetype, color, cols, colspan, compact, content, coords, data, datetime, declare, default, defer, dir, disabled, download, enctype, face, for, frameborder, frameborder, headers, height, href, hreflang, hspace, http-equiv, id, ismap, label, lang, language, link, list, loop, longdesc, low, marginheight, marginwidth, max, maxlength, media, method, min, mozallowfullscreen, multiple, name, nohref, noresize, noshade, novalidate, nowrap, open, optimum, pattern, placeholder, poster, preload, pubdate, radiogroup, readonly, rel, required, rev, reversed, rows, rowspan, rules, scheme, scope, scrolling, selected, shape, size, span, spellcheck, src, srclang, standby, start, step, style, summary, tabindex, target, text, title, type, usemap, valign, value, valuetype, version, vlink, vspace, webkitAllowFullScreen, width, xmlns, data-*

SEE ALSO:

Rich Content Editor

Featured Topics & Feeds

The Featured Topics & Feeds component gives members access to Featured Topics, Discussions, and My Feed in a tabbed setting. Site members must be logged in to see the My Feed tab. The Featured tab shows the featured topics you configured in the Content Management Workspace. You can boost your brand by providing images for featured topics. Topics and images are displayed as tiles on the Featured tab.

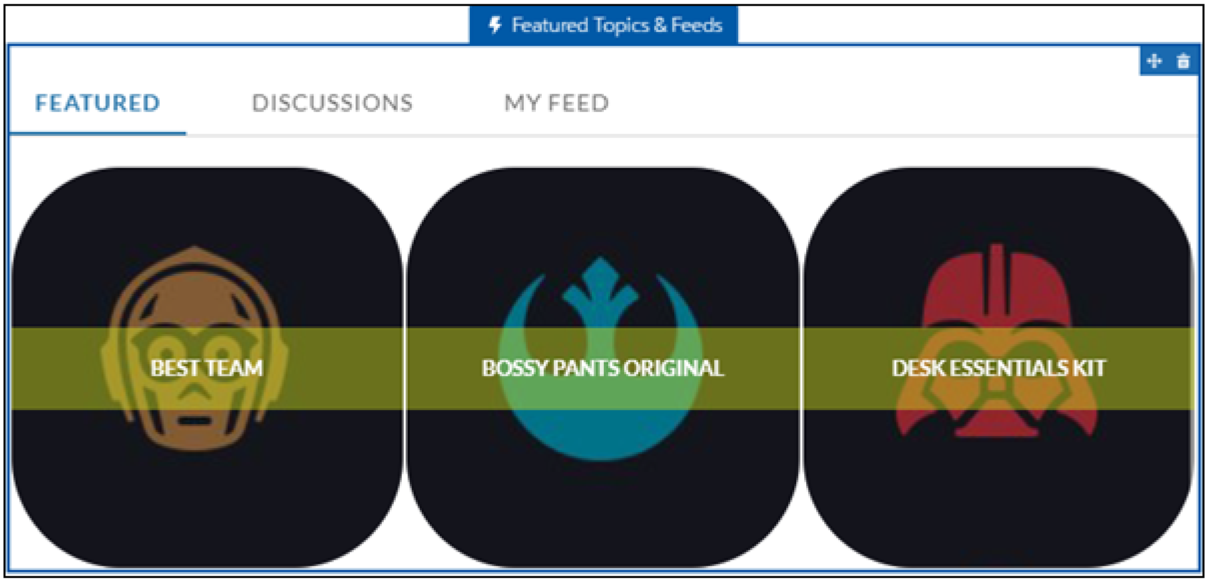
Note: Before Summer '16, this component was named Home Page Tabs.

1. Select the **Featured Topics & Feeds** component in the page you're configuring or drag the component from the Components panel to the page.
2. In the property editor, configure properties for the component:

Property	Details
`Featured Tab Label`	Enter a label for the Featured Topics tab. The default label is `Featured`.
`Discussion Tab Label`	Enter a label for the Discussions tab. The default label is `Discussions`.
`My Feed Label`	Enter a label for the My Feed tab. The default label is `My Feed`.
`Default Sort Order for Discussion Feed`	Present site members and guests with the initial feed sort order that you intend. If users change the sort order in their view, their selection sticks.
`Compact Feed in Discussion Tab`	Use the compact version of the feed on the Discussions tab. Compact feeds show only question titles and make it easier for users to scan the feed. Compact feeds don't support filters.
`Overlay Color`	The color to use as a wash over the tile background color. In the property's **rgba** field, the default is *`0,0,0,0.4`*.
`Overlay Hover Color`	The color to use as a wash over the tile background color when a user mouses over the tile. The link icon indicates that the value is taken from the Experience Builder's theme. In Experience Builder, you can test hover colors in Preview mode.
`Border Radius`	Slide to adjust the curve of the border around each featured topic tile. Note: If the component is in a narrow container, a round radius tends to look more oval. If you set border radius to *`50`*, very round, we recommend that you set Text Position to *`Left`*, *`Right`*, or *`Center`*. The text background color is always rectangular, and placing text at the top or bottom of a circular tile truncates the background.
`Text Color`	Set the color of labels on featured topic tiles.

Property	Details
`Text Hover Color`	Set the color to use for a label when a user mouses over the tile. In Experience Builder, you can test hover colors in Preview mode.
`Text Background Color`	Set the color to use for the tile background when it is inactive. In the property's **rgba** field, the default is *`0,0,0,0`*.
`Text Background Hover Color`	Set the color to use for the tile background when a user mouses over the tile. In the property's **rgba** field, the default is *`0,0,0,0`*. In Experience Builder, you can test hover colors in Preview mode.
`Max Text Background Width`	Move the slider to control the width of the text background color. Width percentage is set against the full width of the tile. So 100% is the full width of the tile, rather than the full width of the browser page or the featured topic component. No matter what percentage you set, the text background width is always wide enough to support that label that sits on it.
`Text Position`	Select where to place text on a featured topic tile. • *`Top Left`* • *`Top Center`* • *`Top Right`* • *`Left`* • *`Center`* • *`Right`* • *`Bottom Left`* • *`Bottom Center`* • *`Bottom Right`*
`Text Alignment`	Set alignment of text within the text background. Select *`Center`*, *`Left`*, or *`Right`*. Note: Alignment changes can be less noticeable when text background is narrow or text is positioned at the top or bottom of the tile.

Example: Sample Featured Topics & Feeds component:



SEE ALSO:

Which Components Can I Use with Each Aura Template?

Event Insights

Use the Event Insights Experience Builder component to show Salesforce IoT data to your site members.

Salesforce IoT and Event Insights must be enabled for your org. Before you can add the Event Insights component, create and activate an orchestration in Salesforce IoT.

1. Select the **Event Insights** component under Records in the page that you're editing.
2. In the property editor, configure the component's properties.

Property	Details
`Orchestration`	Choose the orchestration that contains the variables you want to show.
`Iot Variables`	Select the variables to display.

Note: This component is available only in Lightning Experience and only in English.

Knowledgeable People

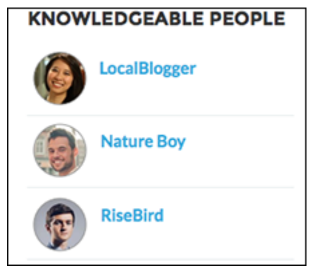
Highlight topic experts so the site can direct questions straight to them. The Knowledgeable People component displays up to five experts, chosen based on factors such as best answers, mentions, or likes on questions and posts.

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

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

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

Example:



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

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

SEE ALSO:

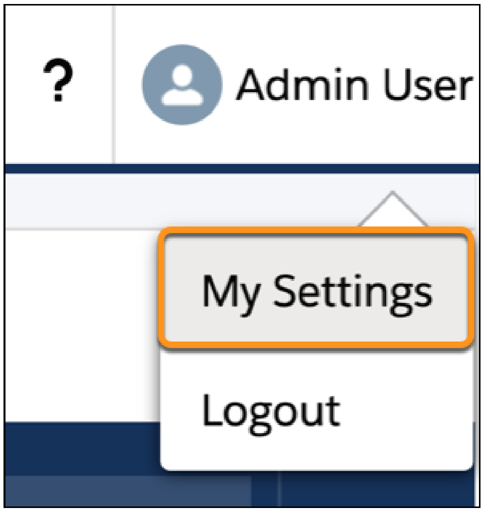
Which Components Can I Use with Each Aura Template?

Language Selector

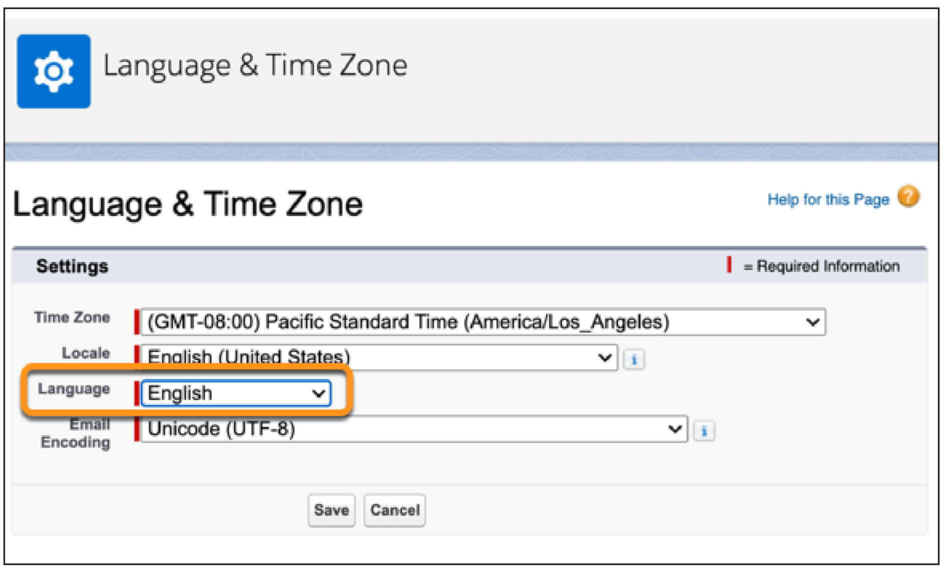
Add the Language Selector component to multilingual sites to let guest users select their preferred language on public site pages.

Only guest users on public pages can see the Language Selector component. The site initially appears in the default site language until the user selects their preferred language. The page then reloads in the selected language, provided a translation is available.

For authenticated users on private pages, the site typically appears in their profile language automatically. But when users have credentials and they're not yet logged in, they're treated like a guest user. So if the user selects a language on a public page that contains a Language Selector component—let's say the Home page—that language choice persists after the user logs in. Similarly, if a private page contains a custom language selector, the user's selection overrides their profile language. To change the profile language preference as a logged in user, open the Experience Workspace for the site you want to view. From the User Profile, click **My Settings**.



Under the My Personal Information menu, click **Language & Time Zone**, and then select a profile language. Then when you access a site as a logged in user, the site URL displays your selected language.



Logout and log back into your site to view the updated profile language.

The Language Selector component isn't included on any page by default. Add it manually to the pages in your site. You can add the Language Selector component to any section of any page, but we recommend placing it where it's easy to spot. Also, consider adding the component to a theme region, such as the Template Header Top region. Items that are added to theme regions are common across all pages, so it's not necessary to add the component to every page.

Note: When a guest user accesses a site in a language not included in the Language Selector component, the site redirects to the set default language in Builder.

Customized components and Salesforce Knowledge articles use the translations that the site admin adds through Translation Workbench.

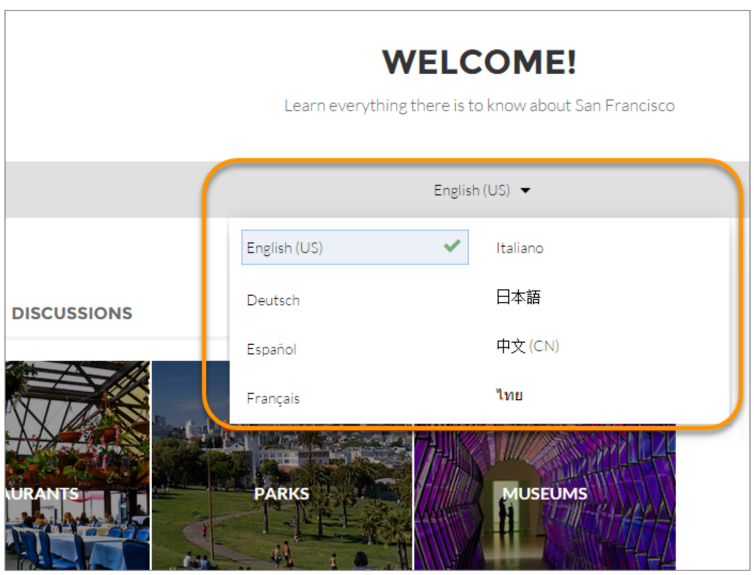
Note:

- For information about setting up languages in a site, see Multilingual Communities Overview. If no languages apart from the default language are set in the site, the language selector shows the default language without a dropdown option.
- To see the list of languages that guest users see, make sure that you're on a page that contains the component. Then click the selector's dropdown icon.
- Ensure that all translated content and Salesforce Knowledge articles have a version in the site's default language.
- Before Summer '18, the Language Selector component was named Language Picker.

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

Property	Details
`Label`	Identifies this component on a page. This text helps increase accessibility. Default text is *`Preferred Language`*.
`Button Label Alignment`	Specifies how the language selector's label is aligned on the button. Select *`Left`*, *`Center`*, or *`Right`*. The default value is `Center`.

Example: Sample Language Selector component with dropdown language list visible:



SEE ALSO:

Which Components Can I Use with Each Aura Template?

Best Practices and Considerations for Multilingual Sites

Lead Inbox

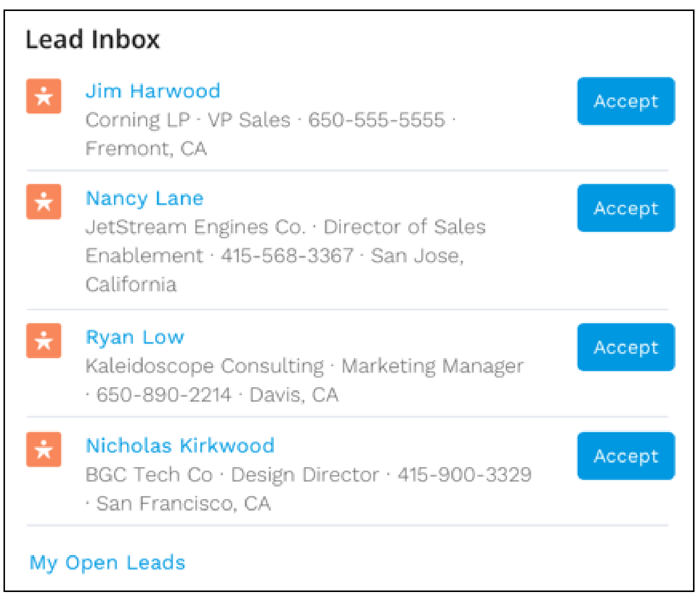
Use the Lead Inbox component to share a common pool of leads with partners in your site.

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

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

Property	Details
`Title`	Specify a title for the lead inbox. The default title is `Lead Inbox`.
`Number of Leads`	Specify the number of leads to display in the lead inbox. The default value is `5`.
`Sort Order`	Select a sort order for the list of leads. You can sort by the date on which the lead was created, ascending or descending.
`Link to the leads list view`	Select to show a link to a lead list view on the lead inbox.
`Linked List View`	If you selected the previous option, specify the leads list view you'd like to show a link for. By default, the first leads list view in the org is selected.

Example: Sample Lead Inbox Component



SEE ALSO:

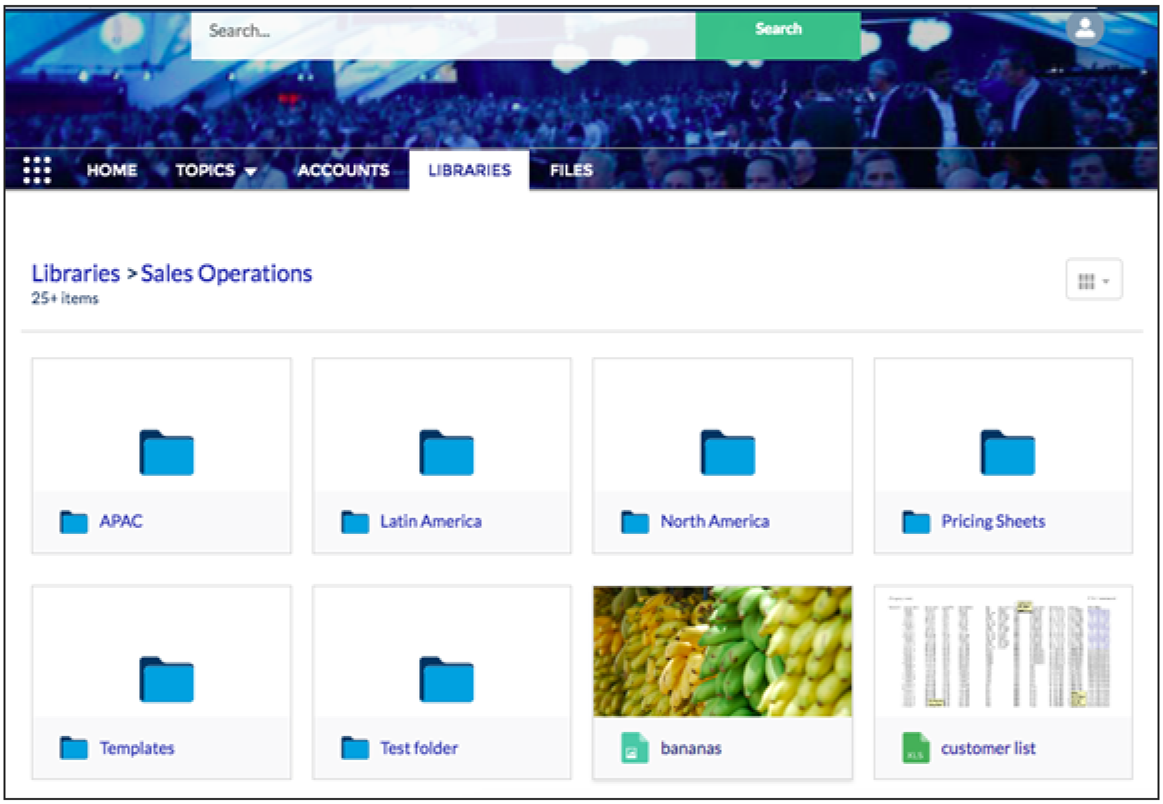
Which Components Can I Use with Each Aura Template?

Libraries

Give access to your libraries to site members using the Libraries component. Use this component in Customer Service, Build Your Own (Aura), Partner Central, and Customer Account Portal templates.

Site members view and open libraries they have access to, either in a list view or a tile view. Drill down inside libraries and folders, and the files display as thumbnails, making it easy to spot a colorful spreadsheet or perfect photo. The Libraries component doesn't have any properties to edit, and it can be used on any page that isn't already using the Files List component.

Example: Sample Libraries component



Manage Members Section

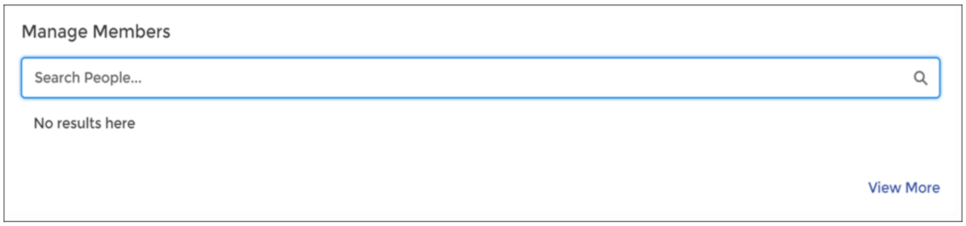
The Manage Members Section component allows you to search for and add members to your group from an Experience Cloud site. Search results update dynamically as you type.

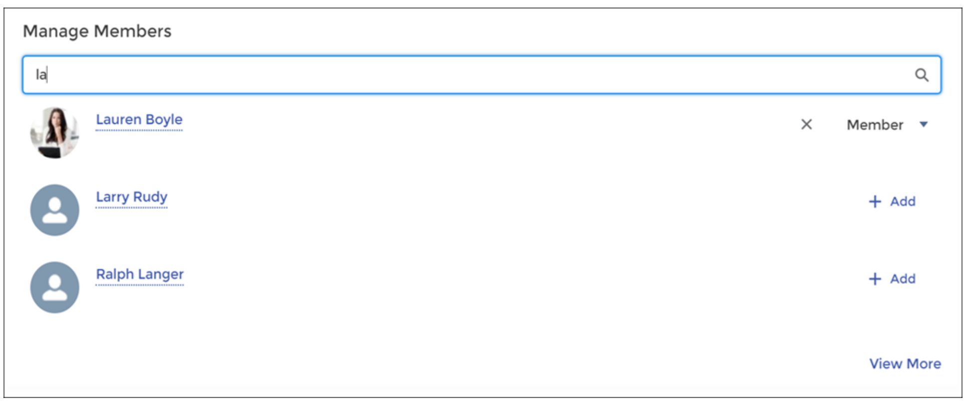
1. Select the **Manage Members Section** component.
2. In the property editor, configure properties for the component:

Property	Details
`Group ID`	Enter a group ID. To find a specific group ID, navigate to the group home page and copy the ID from the URL. The ID is a string of numbers and letters. Group URL format example: `https://`*`MyDomainName`*`.my.site.com/`*`siteName`*`/s/group/0F7A0000000DZXiNQO/`*`groupName`*

Property	Details
	For this URL, the group ID is *0F7A0000000DZXiNQO*.
`Header Label`	Enter header text for your component. The default is *Manage Members*.

Example: Sample Manage Members Section component:





Member Profile and Settings

The Member Profile component allows site members to easily edit their account information. And the best part is that all a member's important information is in one place—profile information and various settings in one handy component. What does that mean for you and your business? Fewer phone calls into your call centers for simple updates.

The Member Profile component uses a default image in the header. Using the component's properties in Experience Builder, you can choose to not show the default image.

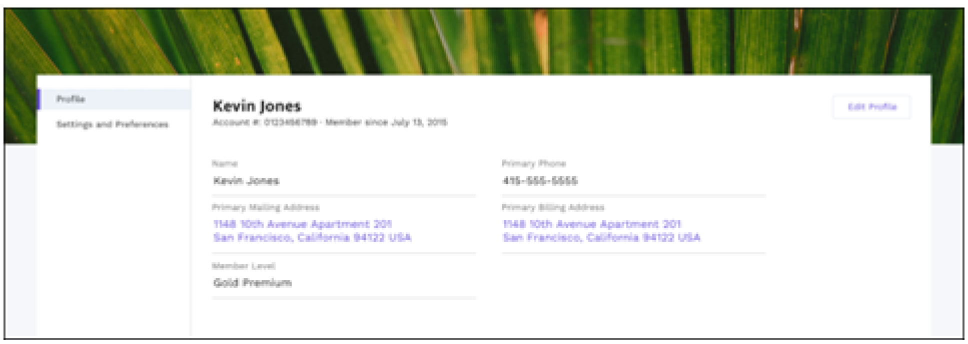
The fields that you see in the Member Profile component are set in Salesforce setup **Setup** > **Users** > **Page Layouts** > **User Profile Page Layout**.

Use the Member Profile component on the User Profile page of sites made using the Customer Account Portal.

1. Select the **Member Profile** component in the page you're configuring.
2. To view the component properties, select the Properties pane:

Property	Details
`User ID`	The system supplies this value so that authenticated users can view their own information. Don't update this field.
`Show banner image at top`	Shows a banner image at the top of the Member Profile component. If unselected, no banner image is seen.
`Edit Banner Image`	Choose a banner image for displaying at the top of the Member Profile component.
`Show Settings tab`	Show the Settings tab on the component.
`Profile Tab Label`	Enter a label for the Profile tab. The default text is *`Profile`*.
`Settings Tab Label`	Enter a label for the Settings tab. The default text is *`Settings & Preferences`*.

Example: Sample Member Profile component.



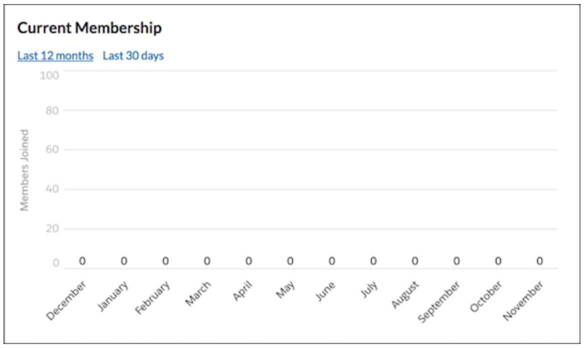
Membership

The Membership component displays the number of new group members, either in the past 30 days or the past 12 months.

The Membership component is visible only to users who have reporting permissions in orgs that have group engagement. You can also choose to make the component visible only to group managers.

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

Property	Details
`Group ID`	The group's ID. Typically, this field is populated when the page loads.

Example: 

Message Notification

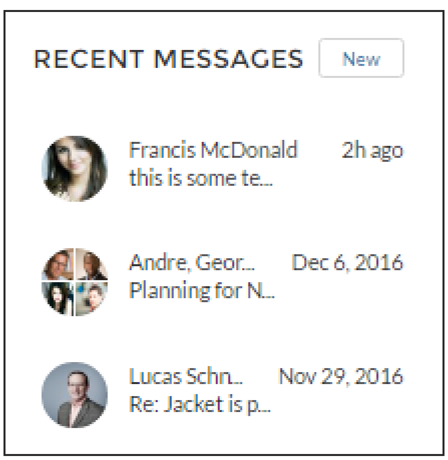
Add the Message Notification component to your site pages to let users view their recent messages from outside the Messages list view. The Message Notification component shows up to three recent messages and allows users to send new messages.

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

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

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

Example: Sample Message Notification component:



SEE ALSO:

Which Components Can I Use with Each Aura Template?

Navigation Bar

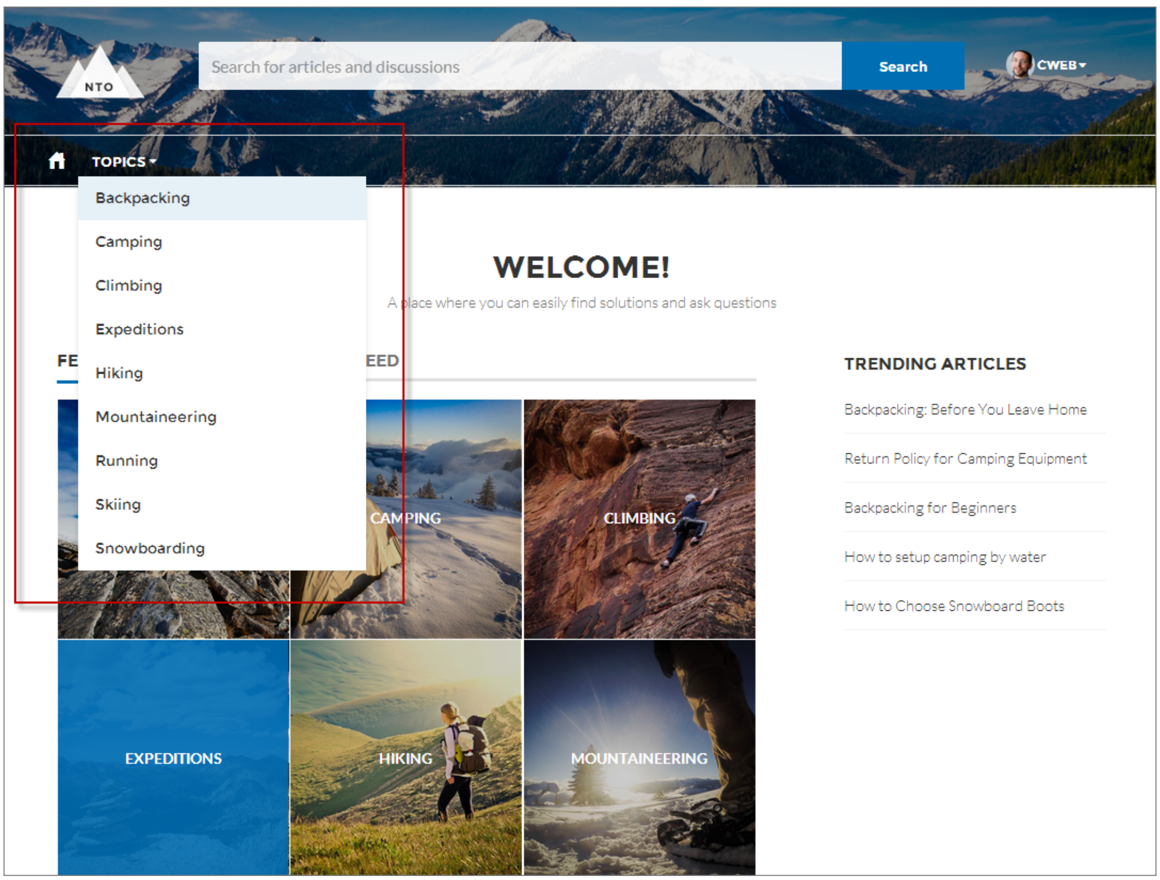
The Navigation Bar component lets users select different topics to browse and provides navigation back to the site home page.

If your Customer Service template version is Winter '16 or later, this component is replaced with the Navigation Menu component.

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

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

Example: Sample Navigation Bar component:



SEE ALSO:

Which Components Can I Use with Each Aura Template?

Navigation Menu

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

When setting up the navigation menu, consider the following:

- You can add up to 20 navigation menu items. Menu items that don't fit on the first line of the navigation menu appear in a `More` overflow menu item.
- If you want to map a navigational topic to a menu item, you must first set it up in Experience Management.
- The Help Center and LWC templates (Build Your Own and Microsites) don't include generic record pages. So if you create an object or global action type menu item that links to a Salesforce object, make sure that you also create the corresponding object pages. If you don't create the associated object pages, end users won't see anything if they click on the menu item.

To create or modify navigation menu items:

1. Select the **Navigation Menu** component in the page you're configuring.
2. To display the App Launcher in existing sites, clear the checkbox for **`Hide App Launcher in header`**.
3. To show an icon for Home instead of text, select `Replace Home text with icon`.
4. In the property editor, click **Navigation Menu**.

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

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

      Options include:

      - Event—Events like log in, log out, and account switcher.
      - External URL—Links to a URL outside of your site. For example, *`http://www.salesforce.com`*.
      - Global Action—Links to a global action. For example, *`New Case`*.
      - Menu Label—Adds a parent heading for your navigation menu. Nest items underneath the menu label.
      - Navigational Topic—A dropdown with links to the navigational topics in your site. Navigational topics are set up in Experience Management.
      - Site Page—Links to a page inside your site using a relative URL. For example, *`/contactsupport`*.
      - Salesforce Object—Available objects include accounts, cases, campaigns, contracts, contacts, dashboards, groups, leads, opportunities, orders, price books, products, quotes, reports, tasks, work orders, and any custom objects.

        Tip: Select this option to create a list view page for the selected object. This option is the easiest way to expose Salesforce record data in your site with minimum configuration.

      - System Link—Links to Experience Builder, Workspaces, and setup.

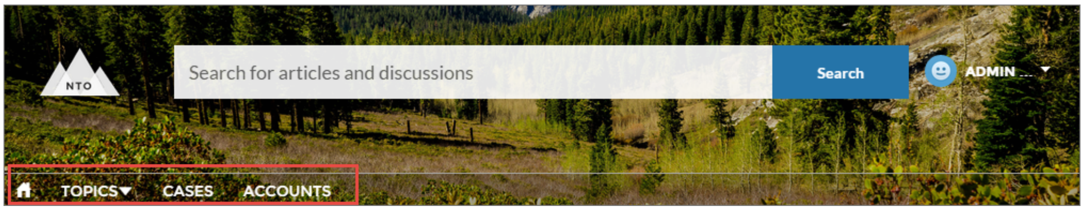
   d. Complete the fields based on the type you selected.

      - If you selected Salesforce Object, select the default list view to show.
      - If you selected Site Page, use the dropdown to select the site page you want to link to. The URL field automatically populates the relative URL for the page based on your selection.
      - To add the Messages page to your navigation menu, replace the `:recordId` parameter with *`Home`*.
      - If you selected External URL, enter the fully qualified URL. To keep navigation within your site, select the `Open link in the same tab` checkbox.
      - Select **Publicly Available** if you want the navigation menu item to show for guest users that aren't members of the site.

6. To move an item, click and drag the item to where you want it to appear in the menu. Nest other menu items underneath a menu label by dragging them to the right under the menu label.
7. To delete a menu item, hover over or click the item and click .
8. To save your changes, click **Save Menu**.

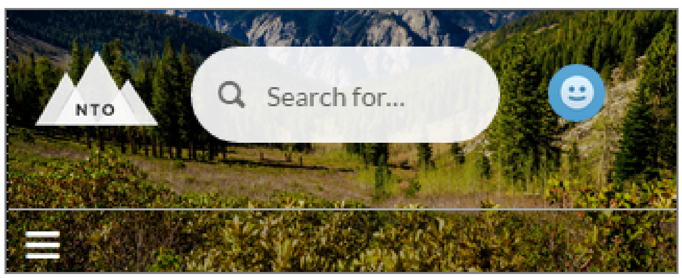
   For these changes to be visible to users, your site must be activated in Experience Workspaces and recent changes must be published.

Example: Sample Navigation Menu component:



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

Sample Navigation Menu component on a mobile device:



If your site hosts users who speak different languages, you can translate your navigation menu using the Translation Workbench. For information on using the Translation Workbench, see Translation Workbench in Salesforce help. Make sure to publish your site after translating so the translations appear to your users.

SEE ALSO:

Which Components Can I Use with Each Aura Template?

Create Personalized Components

New Message Button

The New Message Button lets site members start a direct message conversation from wherever you place the button.

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

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

Property	Details
`User ID`	The ID of the recipient. The system attempts to detect and populate this value based on the page where the New Message Button is placed.
`Label`	Enter a title for the component. The default text is *`Send Message`*.

Example: Sample New Message Button component:

SEE ALSO:

Which Components Can I Use with Each Aura Template?

Path (Experience Builder Site Component)

On object detail pages in Experience Builder sites, use the Path component to indicate and mark the path through a business process.

You can add the Path component to Experience Builder site object detail pages for the following objects:

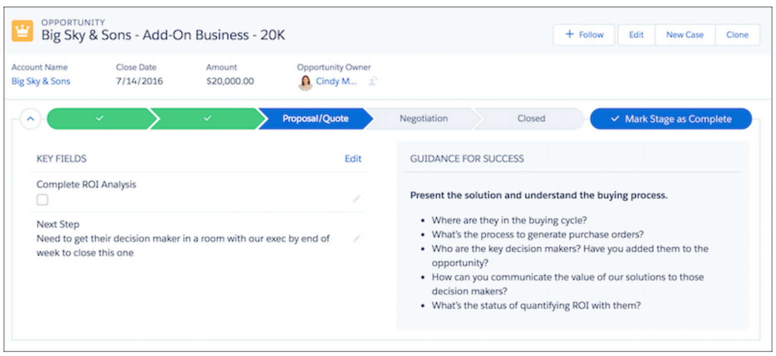
- Account
- Asset
- Campaign
- Case
- Contract
- Lead
- Opportunity
- Order
- Partner Fund Allocations
- Partner Fund Claims
- Partner Fund Requests
- Partner Marketing Budgets
- Product Request
- Product Request Line Item
- Product Service Campaign
- Product Service Campaign Item
- Service Appointment
- Work Order
- Work Order Line Item
- Custom objects

For an overview of setting up Path in Salesforce, see Guide Users with Path. The Path component is intended for a wide-column layout. Add it to columns that are at least 50% wide, though full columns are best.

Note: To make paths available on mobile devices, configure a custom path for mobile. In the mobile app, Path supports leads and opportunities only.

1. Set up a sales process in your org. If you're creating a path for service appointments, work orders, or work order line items, you can skip this step.
2. Set up the path in the Setup menu.
   a. From Setup, enter **Path** in the `Quick Find` box, then select **Path Settings**.
   b. Click **Enable**, and then click **New Path** to create a path.
3. Create object pages in Experience Builder (for any object that supports Path).
4. Drag the **Path** component onto the detail page that you're configuring.

Example: Sample Path component:



SEE ALSO:

Which Components Can I Use with Each Aura Template?

Paused Flows

Add the Paused Flows component to let your Experience Builder site members view all the paused flows they own, resume them at a more convenient time without losing their work, or delete them. When setting up a flow in Salesforce Setup, you must choose pause points in order to allow site users to pause and resume flows.

To pause a flow, your site members must have the **Run Flows** permission.

For example, your financial company has a flow to help folks apply for a credit card. Your customer gets stuck on one of the steps (what *was* my address 12 years ago?). Rather than lose the previous screens of information, the customer can press **Pause** to find the needed information. Or, your customer pauses a step and needs help to continue with the forms. The customer can contact your company, and a service agent can continue the flow for them.

In **Setup** > **Process Automation Settings**, select **Let users pause flows**. Once you set up a pause point in your flows, you can use the Paused Flows component in Experience Builder.

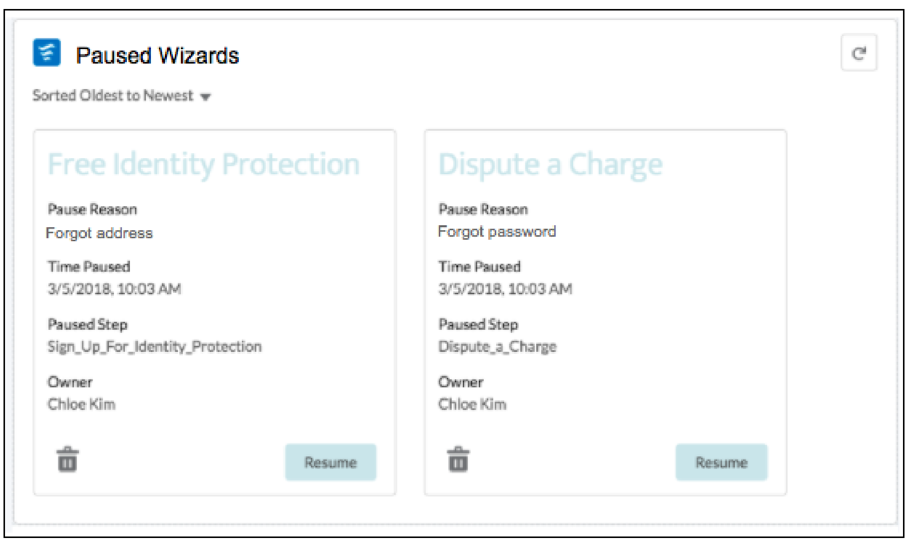
Note: While we call them flows here at Salesforce, your company could call them processes, forms, steps, or wizards. Use a naming convention that your customers understand for the title field.

1. Select the **Paused Flows** component in the page you're configuring.

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

Property	Details
`Title`	Add a title that is easily understood by your site members. Default text is **Paused Flows**.
`Show number of flows in title`	Select to show the number of paused flows in the title, in parentheses.
`Maximum Paused Flows Displayed`	The maximum number of flows shown in the component is 10.
`Show pause reason`	Shows the reason the flow was paused.
`Show pause time`	Displays the time the flow was paused.
`Show pause step`	Displays the name of the step that the flow was paused.
`Show owner`	Displays the flow's owner.
`Delete button`	Displays a delete button to delete the flow.
`Resume Button Label`	The button text to resume a flow. Default text is **Resume**.
`Button Alignment`	Choose the button alignment. Default is **Center**.

Example: Sample Paused Flows component:



Profile Header

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

Important: The User Profile Menu component replaces the Profile Header component in sites based on Winter '18 and later versions of Experience Builder templates.

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

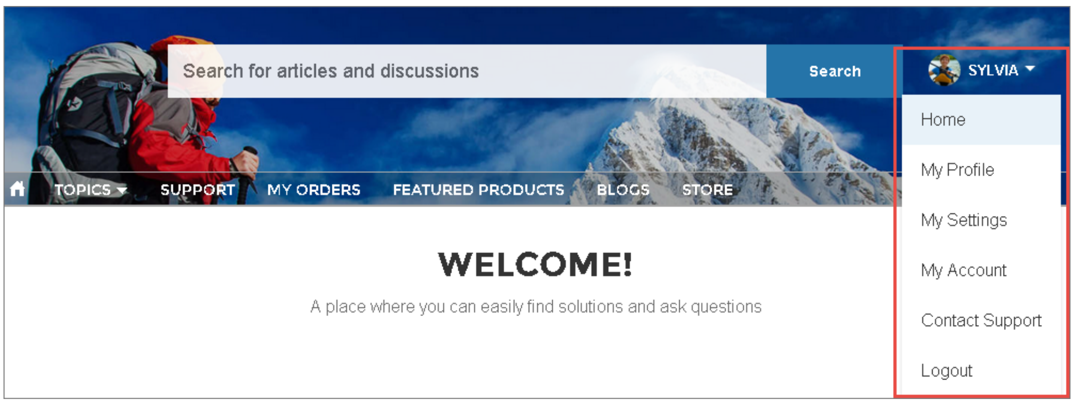
Note: If nickname display is enabled in the site, this component shows the nickname instead of the user's name. The user's reputation level displays only if reputation is enabled in the site.

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

Property	Details
`Case Filter Name or ID`	The name or ID of the list view that displays the user's cases. This value is used throughout the site to display the user's list of cases. **Note:** By default, the template uses the AllOpenCases view, which lets users view any open cases that they have permission to see. Configure sharing to ensure that users see only cases that belong to them. Alternatively, you can use another pre-defined list view or create a custom list view.
`Include Contact Support`	Select this checkbox to include the option to contact an agent from the profile.
`Home Label`	Enter the text you want to show for the link to the site home page from the user navigation menu. The default text is *`Home`*.
`View Profile Label`	Enter the text you want to show for the link to the profile detail page. The default text is *`View Profile`*.
`Contact Support Label`	Enter the text you want to show for the link to the page where the user can open a case. The default text is *`Contact Support`*.
`Login Label`	Enter the text you want to show for the link to log in to the site. The default text is *`Login`*.
`Logout Label`	Enter the text you want to show for the link to log out from the site. The default text is *`Log Out`*.
`Experience Management`	Enter the text you want to show for the link to the Experience Management page. The default text is . This link only appears for users with permissions to manage the site.
`Setup Label`	Enter the text you want to show for the link to the setup page for sites. The default text is *`Site Setup`*. This link is shown to users with permissions to create or modify the site's administration settings.
`User Settings` (Customer Service template only)	Enter the text you want to show for the link to access an authenticated user's personal settings for the site. The default text is *`My Settings`*.
`Show User Settings in Menu` (Customer Service template only)	Select this checkbox to show user setting in the profile drop-down list.

Property	Details
`My Account Label` (Customer Service template only)	Enter the text you want to show for the link that external users click to view their account record. The Default text is `My Account`. This feature is available in the Spring '16 version of the Customer Service template and later. Note: External site members who access the My Account link see their account details based on the configuration of the Record Detail page.

Example: Sample Profile Header component:



SEE ALSO:

Which Components Can I Use with Each Aura Template?

Recognition Badges

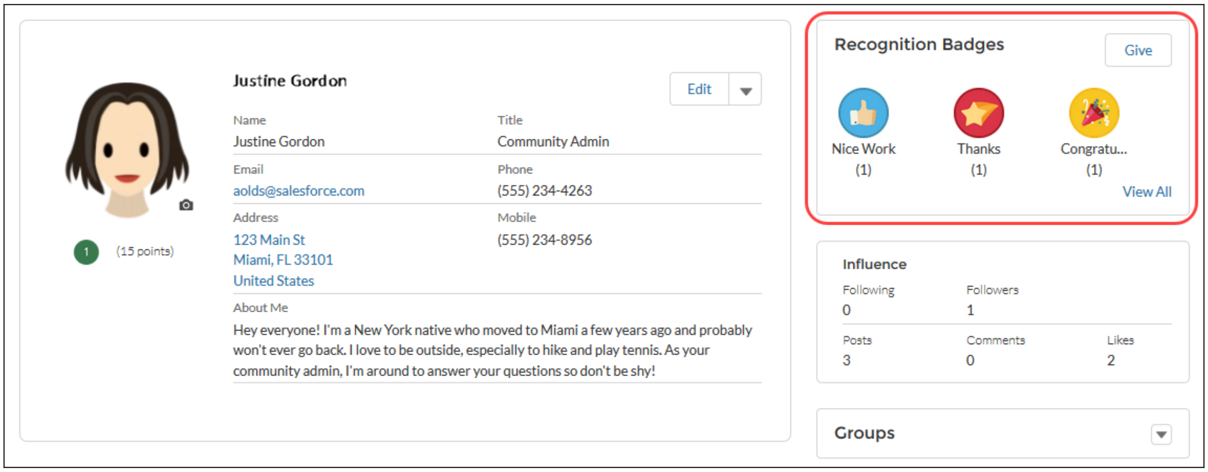
The Recognition Badges component displays up to three of the most recent badges a user has earned. It also shows the Give Badge button, and a link to view all badges the user has earned.

From the User Profile page in Experience Builder,

1. Add the Recognition Badges component to the User Profile page.
2. In the property editor, configure properties for the component:

Property	Details
`Id`	The system supplies this value. Don't update this field.
`Title`	Enter a title for the component. The default text is `Recognition Badges`.
`Button Text`	Enter a name for the button that users click to give badges. The default text is `Give`. The Give button is only available if the **Give Recognition Badges in Lightning Communities** permission is turned on.

Example: Sample Recognition Badges component



SEE ALSO:

[Which Components Can I Use with Each Aura Template?]

Recommendations

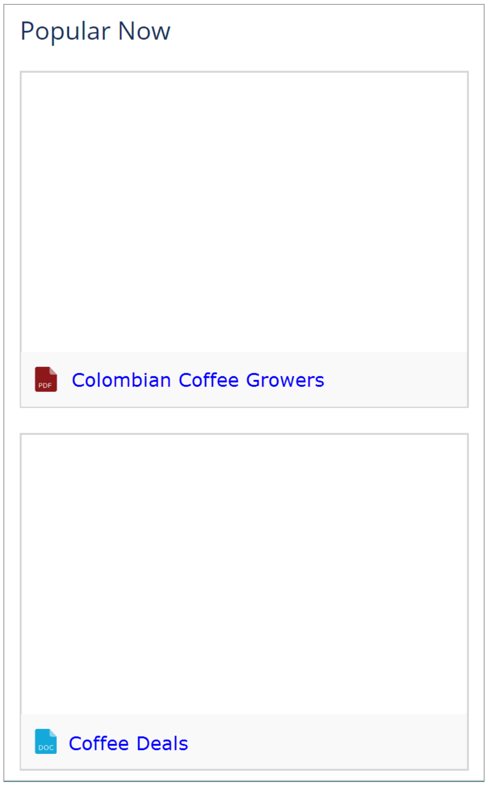
The Recommendations component displays the popular files for your site. Popularity is determined by the number of people who have recently viewed a file and whether the file includes text and is in a library.

The Recommendations component appears by default on the Resources page when a recommendation is available.

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

Property	Details
`Title`	Enter a title for the component. The default text is *`Popular Now`*.

Example: Sample Recommendations component



SEE ALSO:

[Which Components Can I Use with Each Aura Template?]

Recommendations Carousel

The Recommendations Carousel component displays the custom recommendations and system-generated topic recommendations for your Experience Cloud site.

Note:

- For a more updated content targeting experience, we suggest using the CMS Collection component with personalization audiences.
- Before Winter '18, this component was named Recommendations.

The Recommendations Carousel component appears on the page when a recommendation is available.

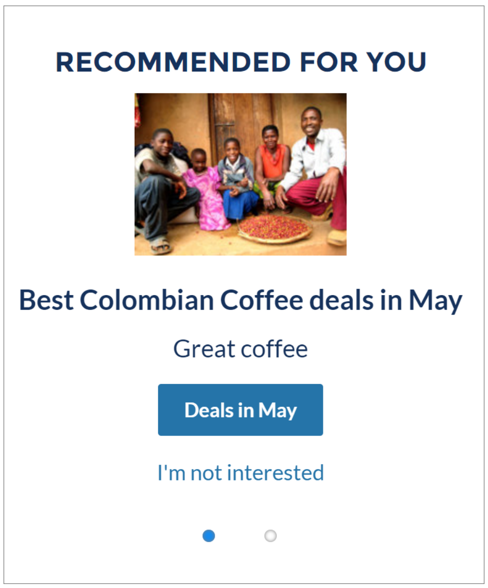
1. Select the **Recommendations Carousel** component.
2. In the property editor, configure properties for the component:

Property	Details
`Title`	Enter a title for the component. The default text is *`Recommended`*.

Property	Details
`Recommendation Channel`	Choose the recommendation channel. The default is *`Default Channel`*. To display recommendations that you created in a custom channel, choose that channel. Use these channel values; you can't rename or create other channels.

So that users don't see the same recommendations all the time, Salesforce periodically removes and brings back custom recommendations that haven't been accepted or dismissed.

Example: Sample Recommendations Carousel component



SEE ALSO:

Which Components Can I Use with Each Aura Template?

Customize Recommendations in Experience Cloud Sites

Record Banner

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

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

- You can use the Record Banner component on custom record detail pages that you create. We recommend using it with the Record Information Tabs component.

- You can modify what fields display in the Record Banner component by customizing the Highlights Panel layout in the object's compact page layout.
- Members with the necessary permissions can use the Edit and Delete buttons to modify or delete the record. These buttons don't display on mobile devices.
- The Record Banner component doesn't support translation on the Topic Detail page.

Note: For optimal appearance, choose a wide column width when placing this component on your page. Some fields are hidden when there isn't enough space to display them due to browser width or zoom level.

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

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

Example:

Note: In the mobile app, lookup fields in the Record Banner component are shown as text, not links.

Sample Record Banner component in the Customer Service template.

SEE ALSO:

Which Components Can I Use with Each Aura Template?

Record Detail

Use this component to share record details in a site built using the Customer Service template.

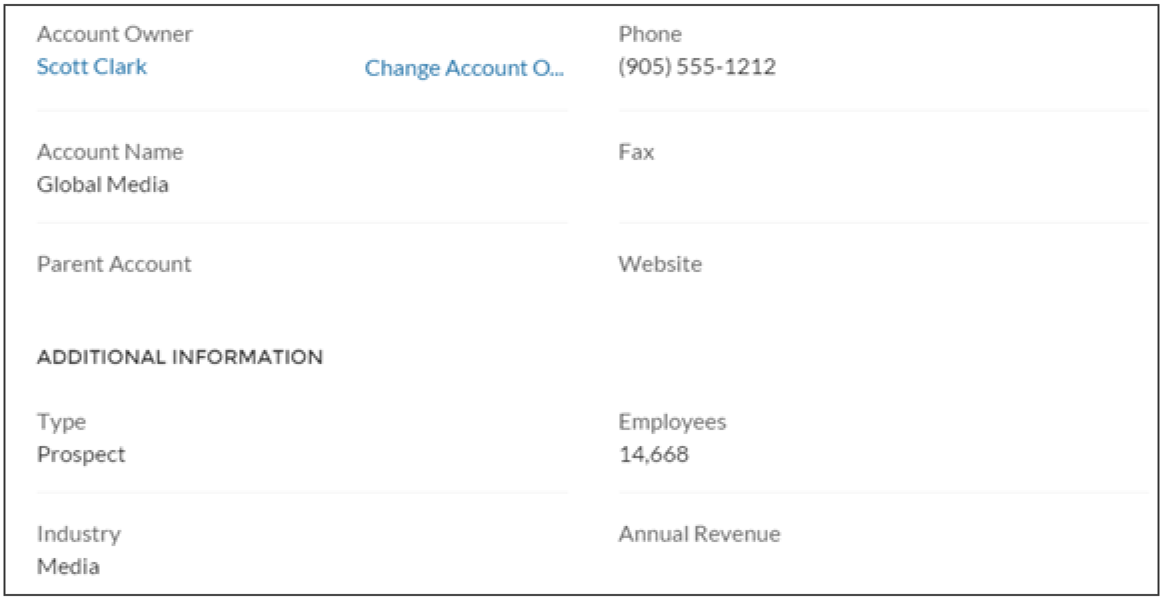
Simply drag the Record Detail component on a record detail or a custom page in the site, and it populates with record information stored in Salesforce. This component is a great way to share information with site members who need it most, like partners. Users accessing the site on a mobile device have access to actions from the record detail page. For example, a partner user with create and edit access to accounts can create accounts or update an account as needed. However, edit inline, available on desktop, doesn't function in mobile or tablet display.

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

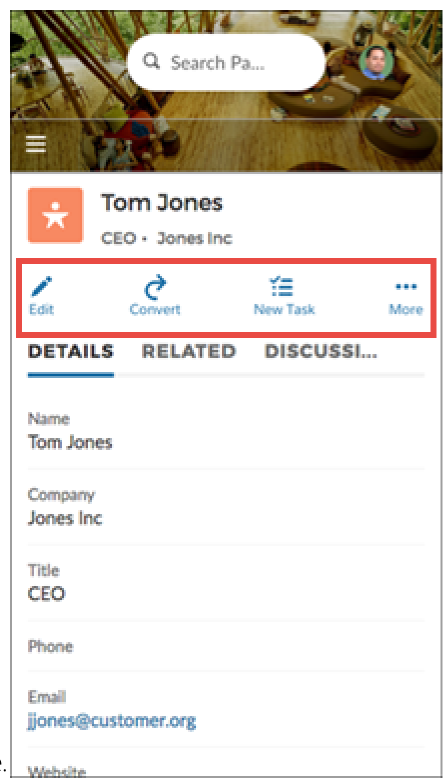
1. Select the **Record Detail** component in the page you're configuring.
2. In the property editor, configure properties for the component:

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

Example: Example of a Record Detail component on a site.



Example of actions on a mobile device.



Record Information Tabs

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

Before Spring '16, this component was called Record Information. The Record Information Tabs component uses the Record Detail Page and the Record Banner component to display record data.

- You can use the Record Information Tabs component on custom record detail pages that you create. We recommend using it with the Record Banner component.
- You can modify what fields display in the Record Information Tabs component by customizing the object's page layout.
- Related lists in the related tab show the number of related records in each list in parentheses. For example, if there are five related contacts associated to an account, the related list shows Contacts (5). If there aren't any related records, the list title shows (0).
- Site members with permissions can create new related records and send emails from the Related tab. They can also expand related record lists to see a longer list. These details are displayed on the generic Record Related List page. Related records in the related tab show the number of related records in parentheses.

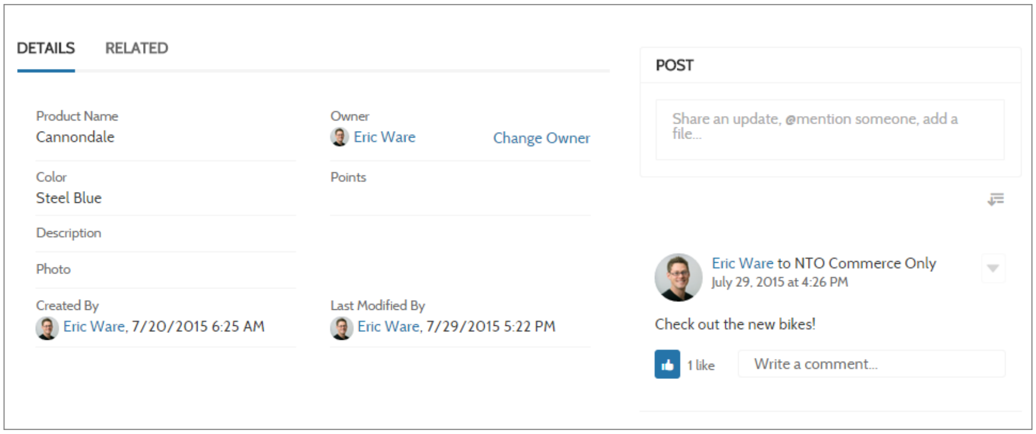
  Note: Emails are supported in accounts, contacts, leads, opportunities, and campaigns.

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

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

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

Example: Sample Record Information Tabs component.



SEE ALSO:

[Which Components Can I Use with Each Aura Template?]

Record List

The Record List component shows a list of records on the Record List page. Users can view records, switch between record list views, and create records directly from the list view. If a user has no access to a particular list view, they see the Recently Used list view instead.

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

When you create a custom navigation menu item using the Salesforce Object type, it automatically links to a list of the records for the selected object. Templates provide a page to display such a list of records. This generic page is called the Record List page. It's used for all objects in your site that don't have a custom page assigned to them.

- The Record List component supports all Object Home page supported objects.
- You can use the Record List component on any page in your site. We recommend adding it to custom list views that you create. You can also create a navigation menu item to link to that page with its internal page URL.

1. Select the **Record List** component on the Record List page.
2. In the property editor, configure properties for the component:

Property	Details
`Number of Records`	The number of entries retrieved to show in the list view. The default is 25. When the compact layout is selected, this property controls the number of records shown. If there are more than 25 records, users click a link to see the full list of records. The maximum number of records for the compact layout is 100. When the full layout is selected, this property controls the number of records initially shown. As a user scrolls down, more records are displayed. The maximum number of records per page for the full layout is 100.
`Layout`	Choose from full, standard, or compact layout. The compact layout is ideal for showing short lists of information in a narrow column or when displaying your site on a mobile device. When a page using the full layout is viewed on a mobile device, the page automatically adjusts to

Property	Details

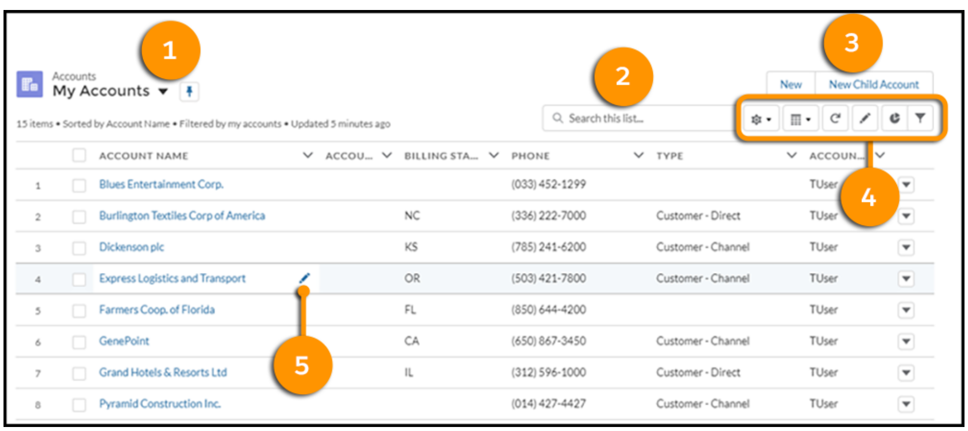
	a more mobile-friendly layout. To display the compact layout on mobile, explicitly select **Compact**.
	
	When choosing the layout, consider the following:
	
	• When using the full layout, use a column width of at least 50% of the page. We also recommend that you don't place another component below the Record List component on the page.
	  – Full layout has a minimum height of 700 pixels. If you place a component below the full layout of the Record List component, the Record List can overlap with the component that's underneath it.
	  – Full layout uses infinite scrolling. If you reference an object that contains many records, infinite scrolling can prevent site members from ever seeing the component below the Record List component.
	
	• Standard layout has some differences in display.
	  – Only the first four fields of the list view are displayed.
	  – When there is no data for the list view to display the Record List component is hidden.
	
	• Compact layout works in any size column. However, **View All** will always redirect to the object home (for example, case list or account list). We recommend that you create a standard page and add the compact list there. This arrangement avoids issues that can arise when the full list for object home has been deleted.
	
	Note: If there aren't records to display for either a standard or compact list view, the component is hidden.

`Object Name`	The Salesforce object whose records you want to show. The dropdown shows the supported objects. The component supports all Object Home page objects. See Objects Supported by Out-of-the-Box Components and Pages in Experience Builder Templates. If **Page's Object Name** name is selected, only `Page's Filter Name` is available in the Filter Name field.
`Filter Name`	The list view to show for the selected object. The dropdown shows only list views that are valid for the object you select.
`Allow list pinning`[1]	Lets users select their preferred default view for a record list. Enabled by default. Lists, as elsewhere in Salesforce, can't be unpinned, but users can select a new list to change their default view. Note: Pinned lists almost always override menu and component list settings. The exception is when the navigation menu for a component receives its filter name from the name of the page—like `My Accounts`. To allow users to see their pinned lists, create at least one more menu item that takes `default` as the list view.
`Allow inline edit`[1]	Lets users edit individual fields in a list. Enabled by default.
Header Configuration	Click to expand.

[4] Available for Full layout only and therefore unavailable when viewed on mobile devices.

Property	Details
`Show list actions`[2]	Displays available list view controls, such as new, sharing, filter, and any custom actions that you've created. Enabled by default. • Users require necessary permissions for the viewed object to use the **New** button on the component to create records. • For shared views, users need appropriate permissions to see the data. • Related Lists for Campaign members have quick filters to narrow results, but the resulting views can't be saved or shared. • Site members can use search and quick filters to quickly find information in their current session. Users can click to filter the list view or remove filters. They can also click to view related charts.
`Show list search`[1]	Displays search field, scoped to the displayed list. Enabled by default.
`Show refresh button`	Enabled by default.
`Show charts button`	Enabled by default.
`Show filter button`	Enabled by default.
`Show object name`	Enabled by default.
`Show image icon`	Enabled by default.
`Show display options`[1]	Lets users view records in a table or Kanban format, or restricts them to a single type of view. Default is **Show All Options**.

Example: Sample Record List component (Full layout):



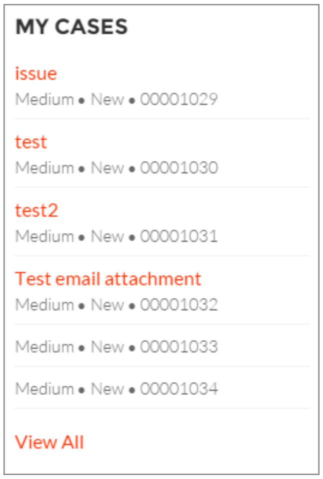
When all properties are enabled, site members can:

- Change the list view and pin it (1).
- Use search (2) to find items in long lists.

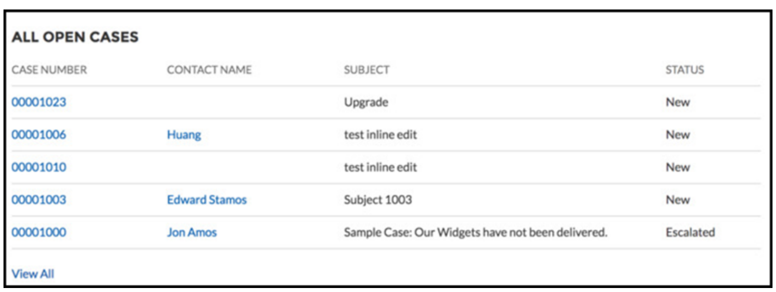
[5] Guest users can't access filter or sort actions on any device.

- Use list actions to accomplish list-related tasks, such as creating a record (3).
- Access list view controls (such as sharing settings), change how the list is displayed, view related charts, and filter the list view (4).
- Edit fields inline (5).

Sample Record List component (Compact layout):



Sample Record List component (Standard layout):



ALL OPEN CASES

CASE NUMBER	CONTACT NAME	SUBJECT	STATUS
00001023		Upgrade	New
00001006	Huang	test inline edit	New
00001010		test inline edit	New
00001003	Edward Stamos	Subject 1003	New
00001000	Jon Amos	Sample Case: Our Widgets have not been delivered.	Escalated

View All

Note: We advise against using the Record List component to show products in a B2B Commerce store. A product Record List doesn't respect user entitlements and could expose information to users that you don't want them to see.

SEE ALSO:

Which Components Can I Use with Each Aura Template?

Objects Supported by Out-of-the-Box Components and Pages in Experience Builder Templates

Related Record List

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

When a user expands the list of related records, the Related Record List page is displayed, which uses the Related Record List component under the hood. The component may occasionally be empty. For example, if there aren't any records related to the current record, or if the current record was created in the last 24 hours, no related items populate the component.

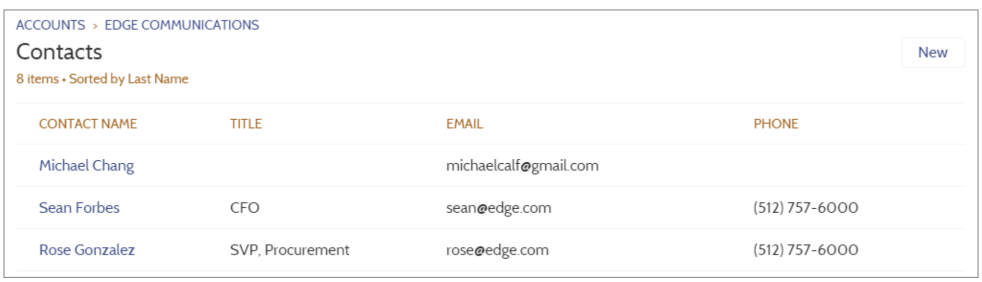
Note: Using the Related List - Single component also allows you to show a single related list on a record. The Related List - Single component fills in the parent record ID dynamically, and allows you to select the related list you want to show.

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

Property	Details
`Parent Record ID`	The ID of the parent record.
`Related List Name`	Name of the related list.
`Breadcrumbs`	Select to show breadcrumbs.
`Custom Title`	Select to display the title in the header.
`Row Numbers`	Select to show row numbers.
`Refresh`	Select to display the manual refresh button.

Note: Related Lists for Campaign members have quick filters to narrow your results for fast results, but the resulting views can't be saved or shared.

Example: Sample Related Record List component:



Note: Related Record List row-level actions aren't available on mobile for Experience Builder sites.

SEE ALSO:

Which Components Can I Use with Each Aura Template?

Related List - Single

The Related List - Single component shows a list of related records based on one specific object. For example, if you're looking at a contact detail page, you can specify to see the cases related to that contact, without seeing all other types of related records. Use the Related List - Single component on an object page or on a custom page to add specific, related information in context for the page. Members can create records from the list and from lookups.

Note: A new version of the Related List - Single component is available in Experience Builder with the Winter '21 release. If you use the old version of the component, shown as Deprecated in the component properties, the component still functions. If you delete your deprecated component, you must use the new version.

To see all related records, use the Record Related List component. When a user expands a related record, the detail page is displayed, which uses the Related List - Single component under the hood. The component may occasionally be empty. For example, if there aren't any records related to the current record, or if the current record was created in the last 24 hours, no related items populate the component.

1. Add the **Related List - Single** component to the page and select it.
2. In the property editor, configure properties for the component:

Property	Details
`Related List`	The specific record type to retrieve and display for the page context.
`Layout Design`	Layout width options to accommodate main body or narrow column placement of your component.
`Change Related List Display`	Format presentation options for items in the list.

Example: Sample Related List - Single component:

Note: Row-level actions aren't available on mobile for Experience Builder sites.

Note: The Related List - Single component isn't supported for Files in the Salesforce mobile and tablet view.

Related Articles List

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

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

The component may occasionally be empty. For example, if there aren't any articles related to the current article, or if the current article was published in the last 24 hours, no related items populate the component.

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

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

Example: Sample Related Articles List component:

SEE ALSO:

Which Components Can I Use with Each Aura Template?

Related Questions List

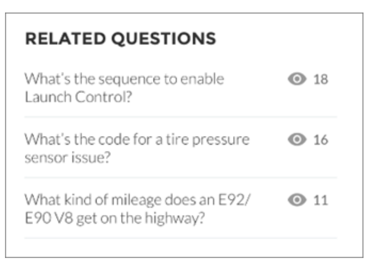
The Related Questions List component displays the questions related to the question the user is viewing.

In the Page Editor, you can configure the Related Questions List component on the Question Detail page. To use this component, your site must have a best answer for at least one question. The component may occasionally be empty. For example, if there aren't any questions related to the current question, or if the current question was asked in the last 24 hours, no related items populate the component.

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

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

Example: Sample Related Questions List component:



SEE ALSO:

Which Components Can I Use with Each Aura Template?

Related Topics List

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

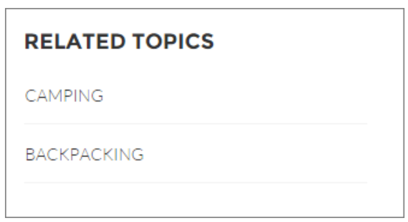
Note: Before Spring '16, this component was named Related Topics.

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

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

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

Example: Sample Related Topics List component:



SEE ALSO:

Which Components Can I Use with Each Aura Template?

Report Chart

Use the Report Chart component to add reports to your site pages. Display the reports that you set up in your Salesforce org's public folder.

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

Note: In Report Chart properties, only the reports that have a chart appear on the dropdown list.

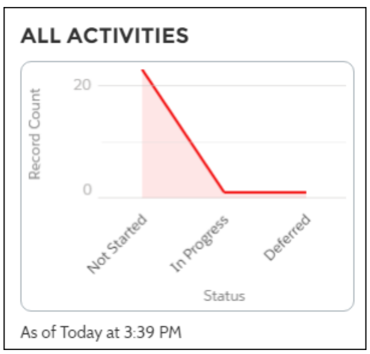
1. Drag the Report Chart component to the page, and select it.
2. In the property editor, configure properties for the component:

Property	Details
`Report Name`	Reports with charts that are available for use in the site.

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

Warning: Instead of a report's developer name, the Report Chart component uses the ID of an associated report to populate the component. If a site page is deployed to another environment (such as from Sandbox to Production), the component breaks if the target org doesn't contain a report with the same ID. If the target org contains a different report that uses the same ID as the source org, the component references the wrong report.

Example: Report Chart component:



Report List

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

The report list can be filtered with these criteria:

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

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

- Created by Me
- Shared with Me
- All Folders

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

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

Report Summary

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

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

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

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

Reputation Leaderboard

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

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

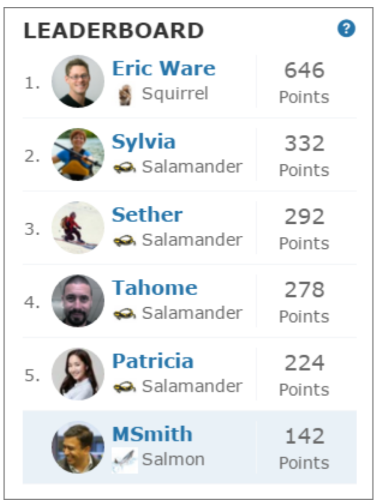
1. Select the **Reputation Leaderboard** component.
2. In the property editor, configure properties for the component:

Property	Details
`Title`	Enter a title for the reputation leaderboard. The default text is `Leaderboard`.
`Number of Users`	Enter the maximum number of users to display. You can display up to 10. The default is 5.
`Show user rank`	Displays the ranks of the users shown in the leaderboard.
`Show logged-in user`	• If the logged-in user does have rank, the user is highlighted on the leaderboard. • If the logged-in user doesn't rank on the leaderboard, a row for the user appears at the bottom of the leaderboard. • If the logged-in user ranks on the leaderboard, AND the Show User Rank checkbox is selected, AND `Knowledge and Points` or `Knowledge and Last Active` is displayed, the user sees a message about their ranking. For example, "Congratulations! You rank #2."
`Show help bubble`	Displays a question mark icon at the top of the leaderboard that a user can hover over to get more info.
`Exclude internal users`	Excludes internal users from the leaderboard.
`Help Bubble Text`	Enter the message that appears when a user hovers over the question mark icon. The message can be up to 500 characters. The default text is `Earn points and climb to new levels when you contribute in the experience!`
`Display Users`	Determines what information about a user shows in the leaderboard. Options include: • Levels and Points—Shows a user's reputation level and total number of reputation points.

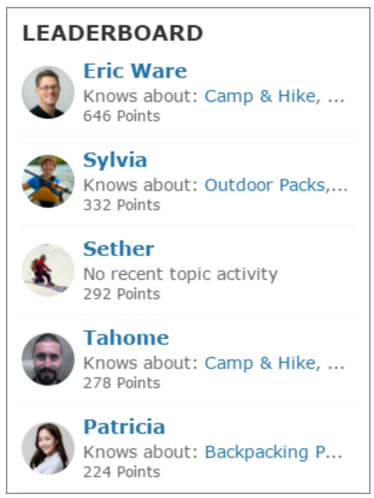
Property	Details
	• Knowledge and Points—Shows a user's total number of reputation points and topics that they're knowledgeable about. • Knowledge and Last Active—Shows topics a user is knowledgeable about and when the user was last active.
`Topic Knowledge Label (Up to 20 chars.)`	When Knowledge is shown in the leaderboard, this text appears before the topics a user is knowledgeable about. The default text is `Knows about`. For example, if a user is knowledgeable about backpacks, their leaderboard entry would say "Knows about: Backpacks."

Example: Sample Reputation Leaderboard component:

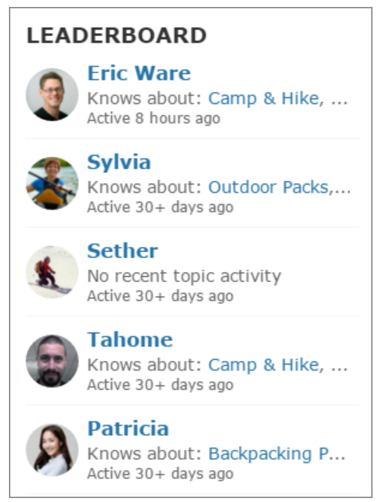
Level and Points



Topics and Points



Topics and Last Active



SEE ALSO:

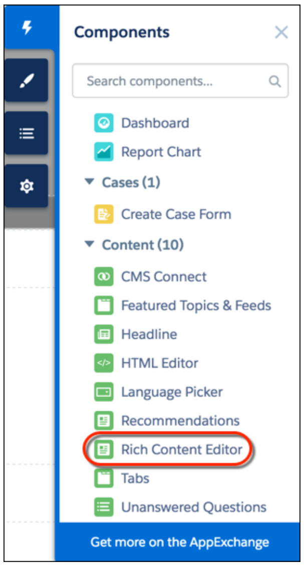
Which Components Can I Use with Each Aura Template?

Rich Content Editor

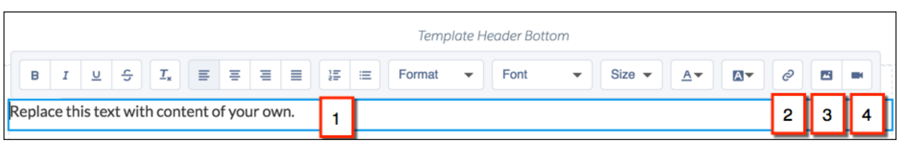
The Rich Content Editor component lets you add formatted custom text to your site pages, along with images and videos.

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

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



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



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

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

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

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin, publisher, or builder in that site

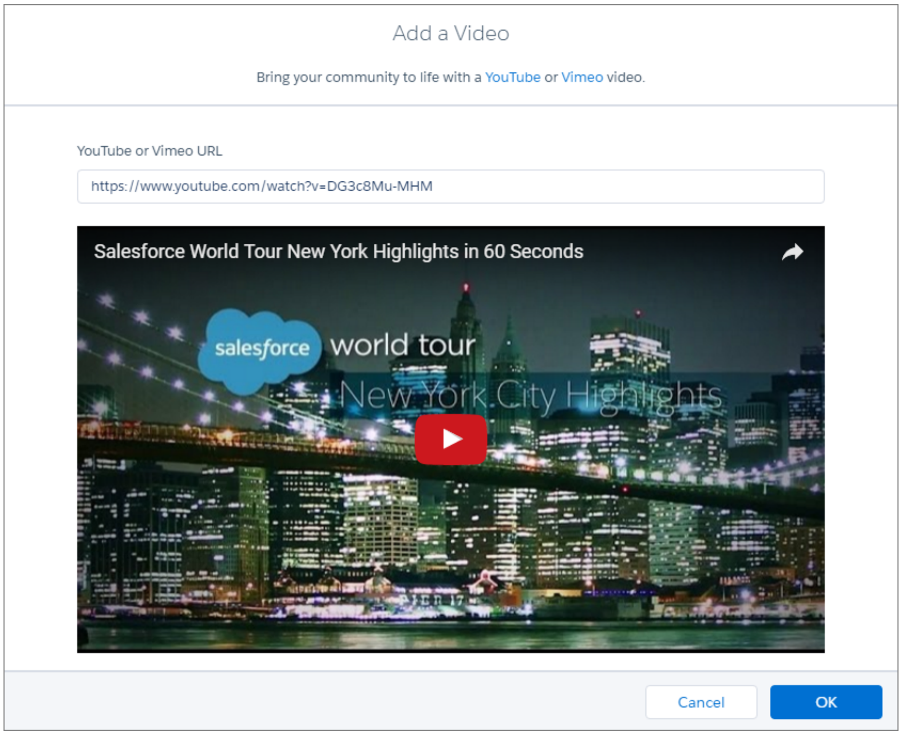
To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

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



SEE ALSO:

Find and Create Asset Files in Experience Builder

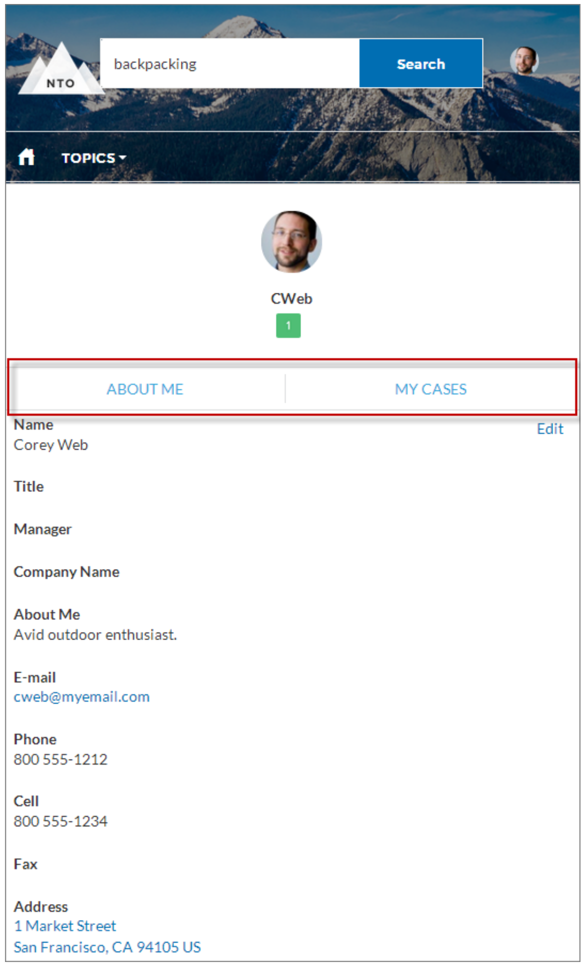
HTML Editor

Scroll To

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

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

Example: Sample Scroll To component:



SEE ALSO:

Which Components Can I Use with Each Aura Template?

Search

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

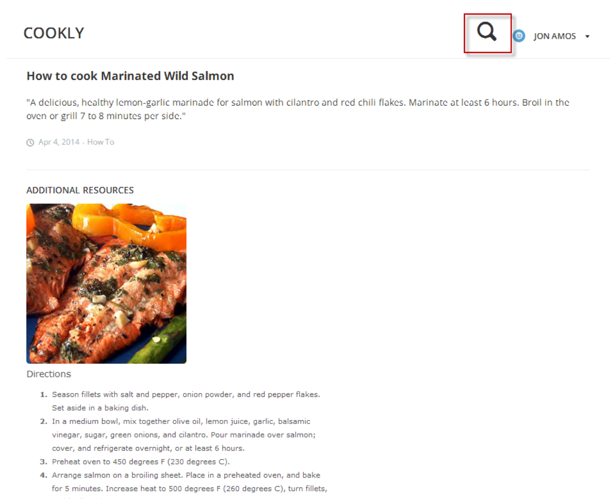
When a user types in the search text box, the system returns suggested articles and search strings that match the characters typed in the search box.

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

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

Property	Details
`Use autocomplete in searches`	Enable autocomplete in searches. When autocomplete is enabled, as users enter a search term, matching results appear as suggested searches.
`Max Autocomplete Results (1 - 10)`	Enter a number, from 1 to 10, to set the maximum number of autocomplete suggestions to provide.
`Objects in Autocomplete Results`	Click **Add** to add searchable Salesforce objects to your site's autocomplete results. To edit an object, click the object name. In the edit window, you can change to another type of object and you can mark the object as **Publicly available**. To select a different object type, click the object name and select from the list. To make results of that object type available to guest users, select **Publicly available**.
`Border Style`	Select a border style for the search field. To show a border at the bottom of the field, select **Bottom Border**. To show a border surrounding the field, select **Full Outline**.
`Input Text Color`	Select a color for the user's search term.
`Input Background Color`	Select a color for the background of the search field.
`Input Icon Color`	Select a color for the search icon.
`Border Color`	Select a color for the border of the search field.
`Placeholder Text Color`	Select a color for the search field placeholder text.

Example: Sample Search component:



SEE ALSO:

Which Components Can I Use with Each Aura Template?

Enable Search Autocomplete for Guest Users

Search & Post Publisher (Deprecated)

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

Note: In Winter '18, this component was deprecated. Use the Global Search for Peer-to-Peer Communities component instead.

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

Customize the Search & Post Publisher to meet the needs of your site. Turn on autocomplete search for more search features:

- Suggest search results to users.
- Add a footer so that users can contact support if they don't find what they're looking for.
- Customize the post publisher for posting questions to the site.

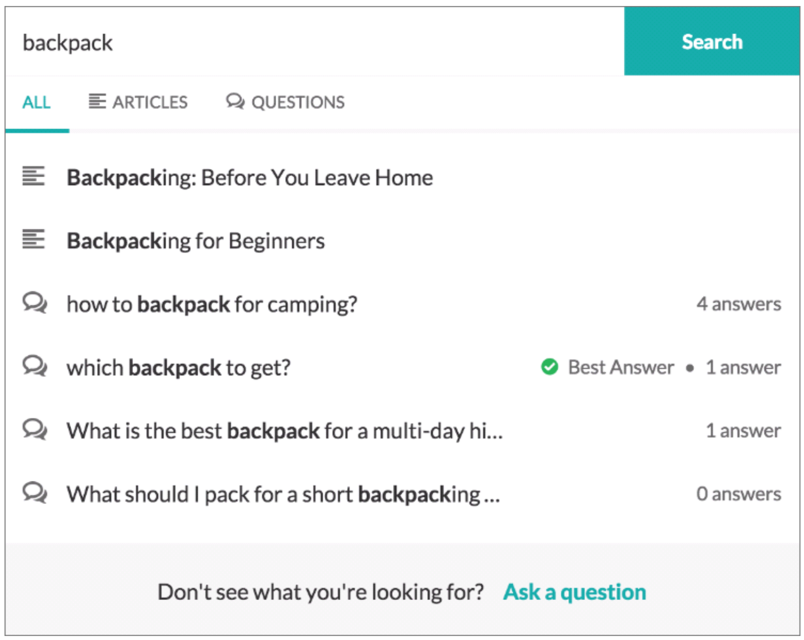
1. Select the **Search & Post Publisher** component in the page you're configuring.
2. In the property editor, configure properties for the component:

Property	Details
Autocomplete Search	Click to expand the section with autocomplete search properties.
`Placeholder Text for Search Field`	Specify the text that appears in the search box. The default text is Search...
`Use autocomplete in searches`	Select to let users see suggested search results as they enter search terms.
`Show autocomplete results in one list`	Select to display suggested search results in one list as a site member enters search terms. Otherwise, the suggested results are shown in tabs. Note: This option must be enabled if you want autocomplete search results that can be sorted by relevance.
`Result Sorting`	Select a method for pre-sorting search results. • `Sort by Relevance`—Sort results by their relevance to the search term. • `Group by Object`—Group results according to each result type, like articles or discussions.
`Maximum Autocomplete Results`	Enter the maximum number of suggested results displayed on each tab during a search. The default is 6. An equal number of questions, articles, and objects is displayed in the combined results tab. But if there isn't enough of one type of result, more results of the other type are displayed to reach the maximum. This functionality is available only in the Winter '16 and later versions of Experience Builder templates.
Autocomplete Results: Sort by Relevance	Click to expand the section that allows you to add searchable Salesforce objects to autocomplete results and have results sort by relevance.
`Objects in Autocomplete Results`	Click **Add** to add searchable Salesforce objects to your site's autocomplete results. To edit an object, click the object name. In the edit window, you can change to another type of object and you can mark the object as **Publicly available**. To select a different object type, click the

Property	Details
	object name and select from the list. To make results of that object type available to guest users, select **Publicly available**.
Autocomplete Results: Group by Object	Click to expand the section with that allows you to set grouping by object for autocomplete results.
`All Results Label`	Enter the name of the search results tab that displays results from all the searchable articles, discussions, and objects in the site. The default text is `All`. This functionality is available only in the Winter '16 and later versions of Experience Builder templates.
`Article Results Label`	Enter the name of the search results tab that displays articles only. The default text is `Articles`. This functionality is available only in the Winter '16 and later versions of Experience Builder templates.
`Discussion Results Label`	Enter the name of the search results tab that displays discussions only. The default text is Discussions. This functionality is available only in the Winter '16 and later versions of Experience Builder templates.
`Show Discussions results before Articles`	Select to list all results for discussions before all results for articles.
Ask Site	Click to expand the section with properties regarding asking the site.
`Show footer during search`	Select this option to display the footer giving members an option to ask the site a question.
`Post to Ask the Site`	Enter the text that invites users to post a question to the site or to customer support. The default text is: Don't see what you're looking for?
`Create Your Question Prompt`	Enter the text that users click to ask a question. The default text is: Ask a question.
`Create Your Sign-In Prompt`	Enter the text that directs users to a login page before they ask a question. The default text is: Sign in to ask a question.
Post to Publisher	Click to expand the section with posting properties.
`Discussion Publisher Title`	Enter the title of the modal window that members use to post questions.
`Create Post Text`	Accept the default, Discussion, or enter a different label for the control that users click to create a post.
`Select Navigational Topic Destination`	Enter the text that lets users pick a navigational topic for their question. The default text is: Post to a navigational topic.
`Post To Topic`	Enter the text that appears before the navigational topic name that the user chooses. For example, if a user posts a question to Coffee, the onscreen text says Post to Coffee.
`Topic Required Label`	Enter the text that shows that selecting a topic is required.
`Allow file attachments`	Select this option to let users attach a file to a question.

Property	Details
`Allow members to add topics`	Select to show a topic area at the bottom of the question and to allow members to add topics.
`Expand Details section by default`	Show the full question Details section. Users can collapse and expand this section as they choose.

Example: Sample Search Publisher component:



SEE ALSO:

Which Components Can I Use with Each Aura Template?

Enable Search Autocomplete for Guest Users

Search Results

The Search Results component lets users view tabbed lists of articles and discussions. The articles and discussions are returned when a user selects a topic or types a string in the Search Publisher.

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

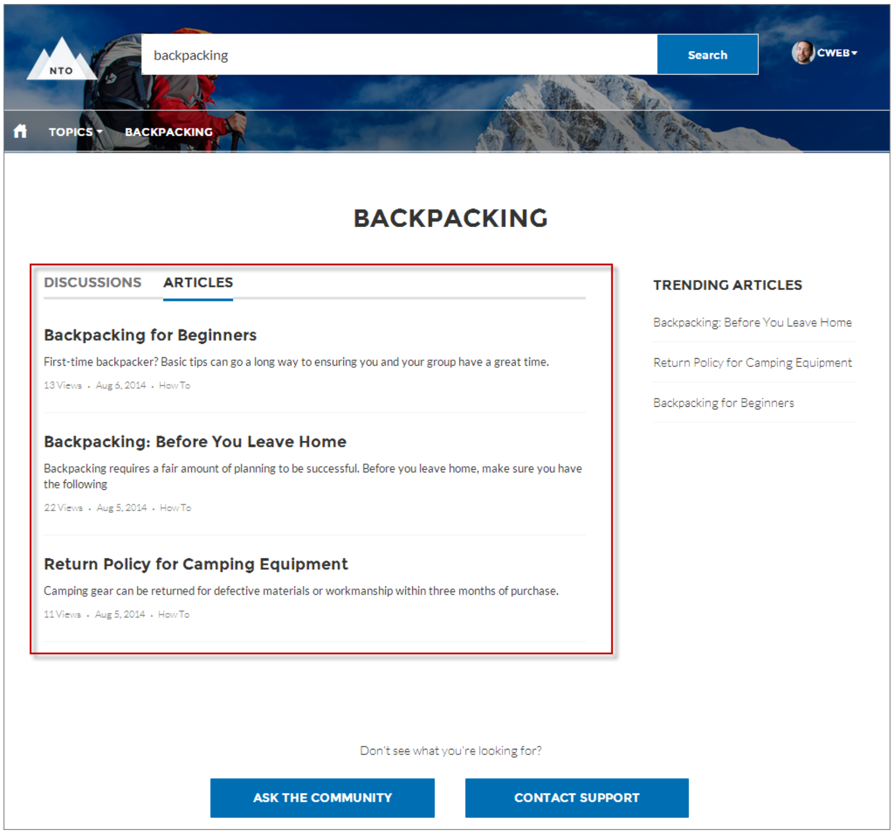
1. Select the **Search Results** component in the page you're configuring.
2. In the property editor, configure properties for the component:

Property	Details
`Articles Tab Label`	Enter the text that appears on the tab that users select to view the list of returned articles. The default text is `Articles`.

Property	Details
`Discussions Tab Label`	Enter the text that appears on the tab that users can select to view the list of returned discussions. The default text is `Discussions`.
`Topic ID`	The expression in the `Topic ID` field uses the topic ID that the user selects when filtering by topic.
`Search Term`	The expression returns results based on the text users enter when typing their search queries.
`Active Tab`	Specify which tab you want to appear as selected with its contents exposed, when the page loads. The expression retrieves the parameter from the query string in the URL for the page. Type *`articles`* to display the article search results first or *`discussions`* to display the contents of the discussion search results first.
`Number of Articles`	Enter the maximum number of articles to show in the component.
`Show Article Tab`	Select this checkbox if you have Salesforce Knowledge enabled and want site members to search for and view articles.
`Default Sort Order for Feed`	The default sort order for the feed on the Discussions tab. Presents site members and guests with the initial experience that you intend. If users change the sort order in their view, their selection sticks.
`Show a streamlined question feed on the Discussions tab`	Select to show a compact feed on page 348 on a search results Discussions tab.

Important: For articles to show up in the Search Results component, they must be associated with a topic. Moreover, the site language and article language must match.

Example: Sample Search Results component:



SEE ALSO:

Which Components Can I Use with Each Aura Template?

Set Case Status Button

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

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

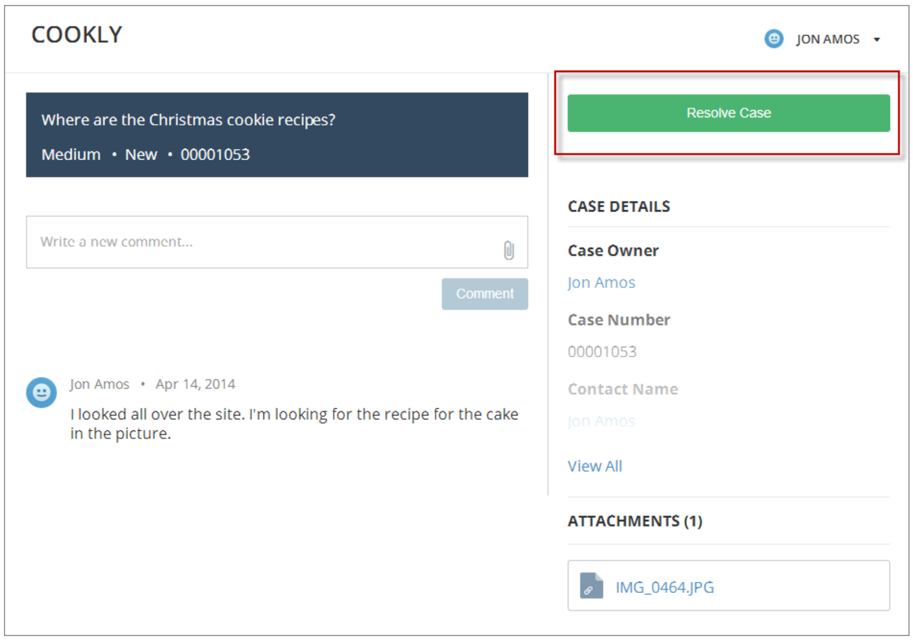
Note: This component is scheduled for retirement in all Salesforce orgs in the Winter '21 release. Starting Summer '17, new sites can't use this component. Sites already using the component can still use it, but if you delete the component or the page containing it, you can't use it again.

1. Select the **Set Case Status Button** component in the page you're configuring.
2. Configure properties for the component in the property editor:

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

Property	Details
`Active Status Label`	Enter the text that appears on the button when the case is still open. For example, the button can be labeled **Close Case** or **Resolve Case**.
`Inactive Status Label`	Enter the text that appears on the button when the case is closed. For example, the button can be labeled **Re-Open Case**.

Example: Sample Set Case Status Button component:



SEE ALSO:

Which Components Can I Use with Each Aura Template?

Embedded Appointment Management

The embedded Appointment Management component allows users to schedule, modify, or cancel an appointment.

Important:

- Make sure to set up Field Service, build the flows you need, and install the Field Service Lightning managed package before adding this component to your site pages.
- Remove the Embedded Chat component from the site pages where you want to use this component. You can use one embedded component per page.

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

Property	Details
Embedded Service Deployment	Select an embedded Appointment Management deployment.
Logged In Button Label	Enter a label for the appointment manager when users are logged in. The default label is `Book Appointment`.
Logged Out Button Label	Enter a label for the appointment manager when users aren't logged in. The default label is `Log In and Book Appointment`.
Button Loading Message	Enter a label for the appointment manager when the flow is loading. The default label is `Loading...`.

Embedded Service

The Embedded Service component allows users to request a chat with a support agent.

Important:

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

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

Property	Details
Chat Deployment	Select an Embedded Chat deployment.
Display Chat Button	Display the chat button to users.
Fill in Pre-Chat Fields	When selected, the name and email fields on your pre-chat form are pre-populated for logged-in users.
Button Label	Enter a label for the chat button. The user sees this text before they start a chat. The default label is `Chat with an Expert`.
Offline Button Label	Enter a label for the chat button when there are no support agents available to chat. The default label is `Agent Offline`.
Offline Support Button Label	Enter a label for the chat button when there are no support agents available to chat, and your Embedded Service deployment has offline support enabled. Offline support lets you present a web-to-case form inside the chat window when agents are offline. The default label is `Contact Us`.
Chat Waiting Message	Enter a label for the chat button when a chat has been requested and is waiting for an agent. The default label is `Loading...`.

Property	Details
Chat Waiting Background Image URL	Enter a URL for an image to display in the chat window when a chat is waiting for an agent.
Agent Avatar Image URL	Enter a URL for an agent avatar image to display in the chat window. This avatar applies to all agents taking chats from this button. We recommend using an image no larger than 40x40 pixels
Pre-Chat Background Image URL	Enter a URL for a banner image to display in the chat window while the user fills out the pre-chat form.
Code Setting Name	Enter the code setting name from Embedded Chat setup and load JavaScript files you've added as static resources.
Company Logo URL	Enter a URL for a logo to display in the minimized chat window when a chat is waiting for an agent. We recommend using an image no larger than 25x25 pixels.
Routing Order	Enter IDs for `userId`, `buttonId`, or `userId_buttonId`, separated by commas. This field sets a routing order to agents and chat buttons for the Embedded Service Deployment which overrides the assigned Chat button.
External Scripts	Enter the static resource name for the externals script used to create custom chat events. Use the name of the static resource object, like *`CustomEvent`*, instead of the name of the file itself.
External Styles	Enter the static resource name for the external style used to create custom chat events. Use the name of the static resource object, like *`CustomStyles`*, instead of the name of the file itself.
Storage Domain	Enter an existing site domain for your deployment. Let visitors navigate between subdomains during a chat session and ensure their continuous session continuity.

Stream Detail

The Stream Detail component is available to repair the Stream Detail page in the event its Stream Detail component is mistakenly removed.

1. In the Experience Builder, select the **Stream Detail** component in the page you're configuring.
2. In the property editor, configure properties for the component:

Property	Details
`Stream ID`	Stream ID has a default variable value that gets the ID of whatever stream was selected on the Stream List page. We recommend that you leave this value at its default, `{!recordId}`. Changing this value fixes the display to one stream that only one site member has access to. That is, the member who created the stream with the fixed ID you enter here.

Stream List

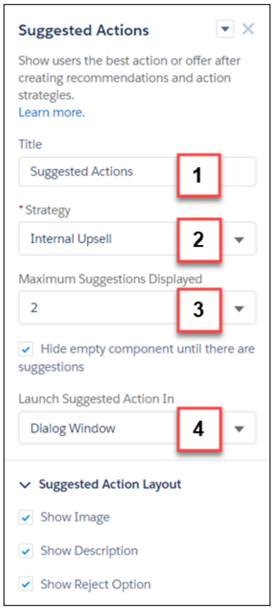
The Stream List component is available to repair the Stream List page in the event its Stream List component is mistakenly removed. The Stream List component has no properties.

Suggested Actions

USER PERMISSIONS	
To create an Experience Cloud site:	Create and Set Up Experiences AND View Setup and Configuration
To customize an Experience Cloud site:	• Be a member of the site AND Create and Set Up Experiences • OR • Be a member of the site AND an experience admin, publisher, or builder in that site
To publish an Experience Cloud site:	• Be a member of the site AND Create and Set Up Experiences • OR • Be a member of the site AND an experience admin or publisher in that site
To run a suggested action in an Experience Builder site	Run Flows OR Flow User field enabled on the user detail page OR If **Override default behavior and restrict access to enabled profiles or permission sets** is selected for an individual flow, access to that flow is given to users by profile or permission set

Suggested Actions brings the power of Einstein Next Best Action into sites. Choose strategies that apply your org's business rules to display suggested offers and actions.

1. Create a recommendation strategy in the Strategy Builder.
2. Drag the Suggested Actions component onto your site page.
3. In the property editor, enter the title that you want customers to see (1) and select the strategy you want to display (2). Enter the maximum number of suggestions to display (3) and choose where the suggested actions open (4).



Title

Displays this title for the component on the site page. The default title is Next Best Action.

Strategy

Displays all available strategies created in Strategy Builder.

Maximum Suggestions Displayed

Allows up to four suggestions to display when there are multiple suggested actions available.

Hide Empty Component

Hides the component when there are no suggested actions initially available. If there are actions available when the app opens, the component continues to display, even if the actions run out.

Launch Suggested Actions In

Specifies whether your suggestions open in a display window, a new browser window, or on a site flow page.

Show Image

Shows images associated with each suggested action. If the recommendation doesn't have an image, a placeholder displays.

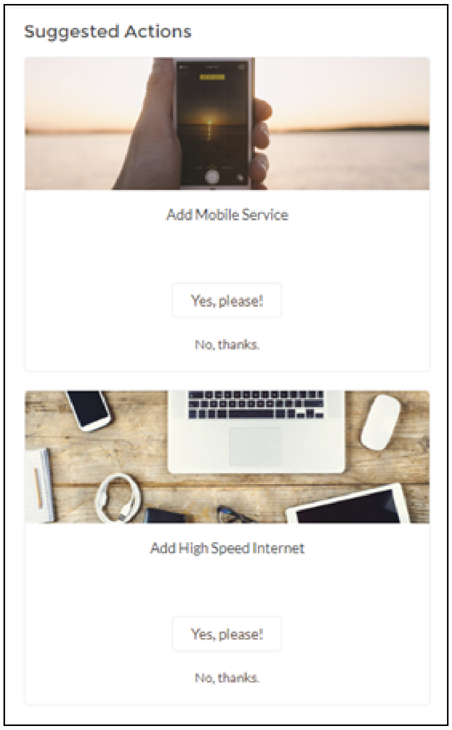
Show Description

Displays the description defined on the Recommendation record.

Show Reject Option

Displays the reject option associated with suggested actions.

Example: Here's how a strategy looks when it displays in a site.



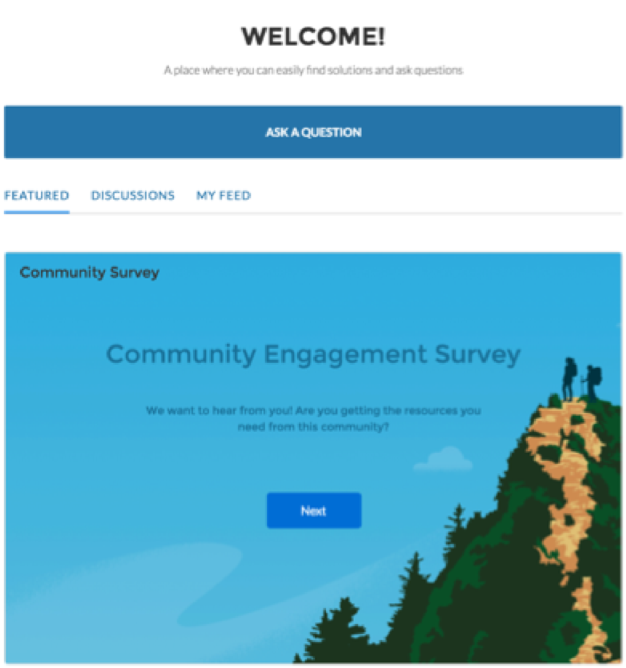
Survey

Use the Survey component to embed active surveys into your site's pages.

1. In the page that you're configuring, select the **Survey** component.
2. In the property editor, configure properties for the component:

Property	Details
Survey Name	Select an active survey.

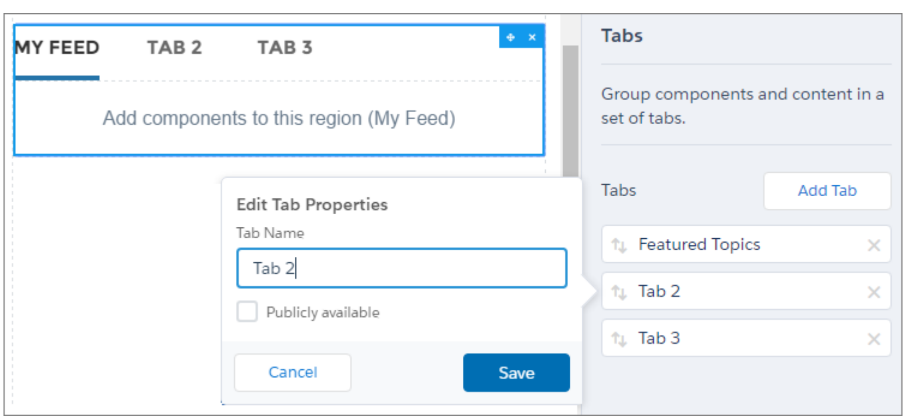
Example: Sample Survey component:



Tabs

Use the Tabs component in the Customer Service to group other components in a set of customizable tabs for structure. Add as many tabs as you need and whatever components you want. You can rename and reorder the tabs, and choose whether to show or hide individual tabs to guest users in the site.

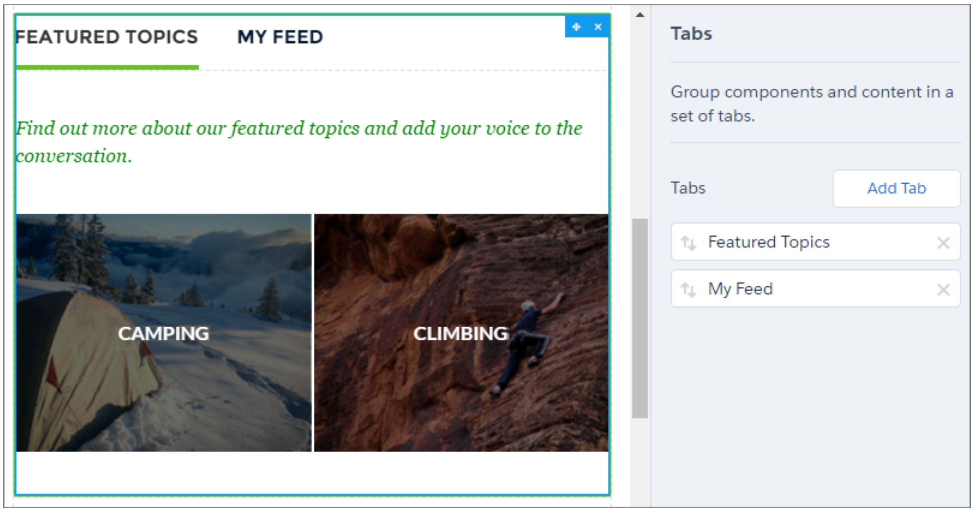
1. Add the **Tabs** component to a page or select it on the page you're configuring.
2. In the property editor, configure the component.
   - To add another tab, click **Add Tab**.
   - To rename a tab or set its public availability, select the tab. To make that tab available to guest users in the site, select **Publicly available**. If no tabs are publicly available, the entire Tabs component is hidden from guest users.
   - To reorder a tab, drag the tile to the correct position.



3. Add the components you need to each tab.

   Note: You can't add a Tabs component to another Tabs component.

Example: Sample Tabs component with two renamed tabs—Featured Topics and My Feed:



SEE ALSO:

Which Components Can I Use with Each Aura Template?

Tile Menu

Use the Tile Menu Lightning Web component in Experience Builder to add an intuitive and visually stunning navigation experience to your site.

Customers using the Tile Menu can use images to access an external site, page, record, or global action. For example, clicking an image takes a customer to a page to log a case or file a claim. You can set up a maximum of eight image-link combinations per Tile Menu component.

Consider the following when setting up your Tile Menu:

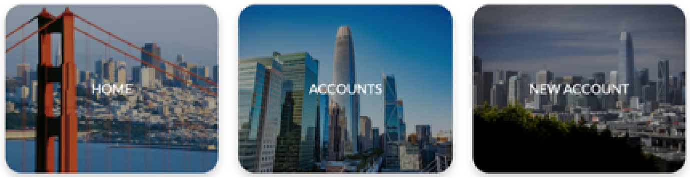
- To make the images in the tile menu viewable by guest site users:
  - Enable **Let guest users view asset files and CMS content available to the site** in **Administration** > **Preferences** in Experience Builder.
  - Access the site's guest user profile and **Object Settings**.
  - Then, give read access to Documents.
- When using Translation Workbench to translate text in the Tile Menu, select **Navigation Menu Item** as your **Setup Component**.
- A new version of the Tile Menu component was included in the Summer '20 release, and allows for much more customization. The new version of the Tile Menu is available in Experience Builder in the Summer '20 release. If you use the old version of the component, shown as Deprecated in the component properties, the component still functions. If you delete your deprecated component, you must use the new version.

Note: You can package a tile menu with Bolt Solutions, and distribute them. All the properties of the tile menu are included in the package, but admins have to associate a navigation menu to the tile menu once the Bolt Solution is installed..

1. From the components list, select the Tile Menu component and drag it onto a site page.
2. On the page, select the **Tile Menu** component.
3. In the property editor, configure properties for the component:

Property	Details
`Default Navitation Menu`	Select a navigation menu to showcase in Tile Menu.
`Edit Navigation Menu`	Click to edit your chosen navigation menu.
`Image Layout`	Select one of the three image options for the images in each menu tile. • Full, No Overlay: Image takes up the whole tile. The banner with text doesn't overlay the image. • Full, With Overlay: Image takes up the whole tile. The banner with text overlays the image. • Partial: Image is contained in an icon-type box within the tile.
Tile Formatting	Click to expand.
`Show banner`	For the Full, With Overlay layout, choose to show a banner.
`Banner Position`	Options for: • Full, No Overlay: Top • Full, With Overlay: Top or Bottom • Partial: Top, Right, Left, Bottom
`Banner Height`	Choose 15–100%. Note: This setting doesn't apply to the Full, No Overlay layout.
`Banner Background Color`	Set the color for the banner background.
`Border Radius`	Choose from 0-50px.
`Blank Image Color`	Tile color if there's no image.
`Tile Background Color`	For the Partial layout, the background tile color if the image doesn't take up the entire tile.
`Icon Size`	Size of the icon containing the image for the Partial layout. Choose from small, medium, or large.
Text Formatting	Click to expand.
`Color`	Text color.
`Size`	Text size. Choose from small, medium, or large.
`Horizontal Alignment`	Choose from right, left, or center.

Example: Example of a tile menu.



SEE ALSO:

Navigation Menu

Create Personalized Components

Toggle Button

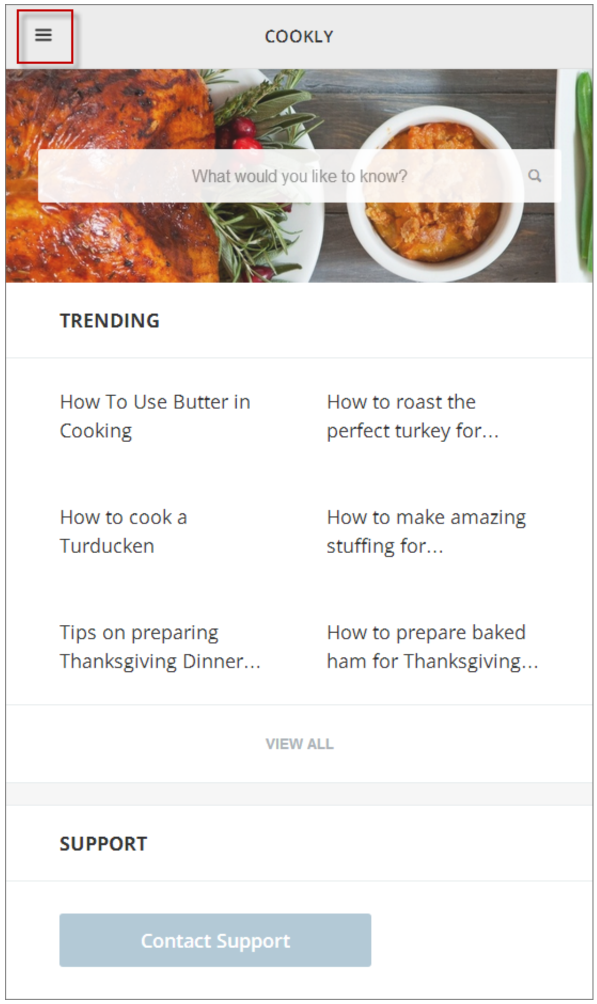
The Toggle Button component lets users display or collapse the left navigation menu for mobile devices and tablets. It doesn't appear in the desktop view.

You can find the **Toggle Button** component in the template header.

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

   There are no properties to set for this component.

Example: Sample Toggle Button component:



SEE ALSO:

Which Components Can I Use with Each Aura Template?

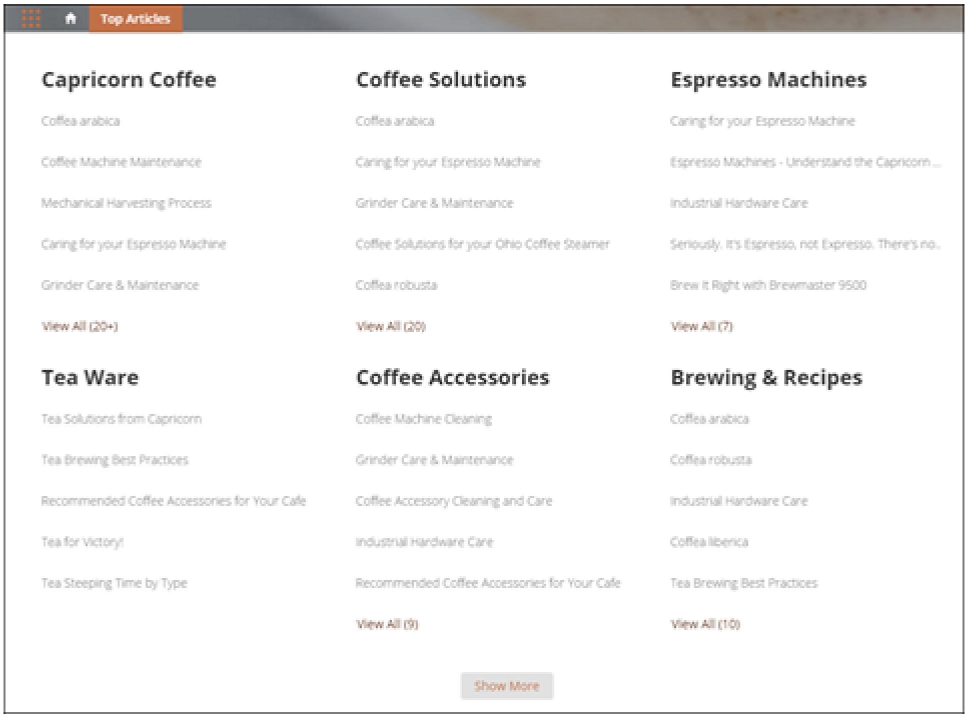
Top Article by Topic

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

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

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

Example: Top Articles by Topic component in use:



Topic Catalog

The Topic Catalog component lets Experience Builder site members see a full listing of navigational parent and subtopics you have set up for the site in one convenient location.

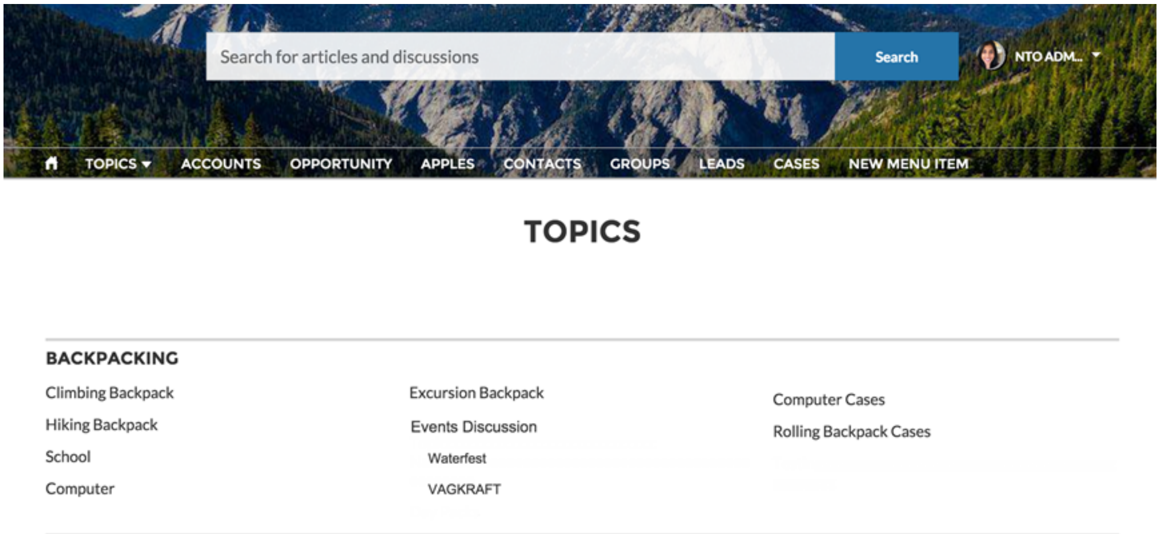
The following is the maximum number of navigational topics and subtopics you can have in a Customer Service template.

Level	Maximum Number of Entries
One (parent)	25
Two (subtopic)	10
Three (subtopic)	10

Note: The topic catalog shows only navigational topics and subtopics, and is only visible after you set them up.

1. Edit the Navigation Menu component in your site (typically, on the home page).
2. Select **Add the "More Topics..." link**.

Example: When site members click `More Topics` from the Topics list in the navigation menu, they see the topic catalog.



SEE ALSO:

Which Components Can I Use with Each Aura Template?

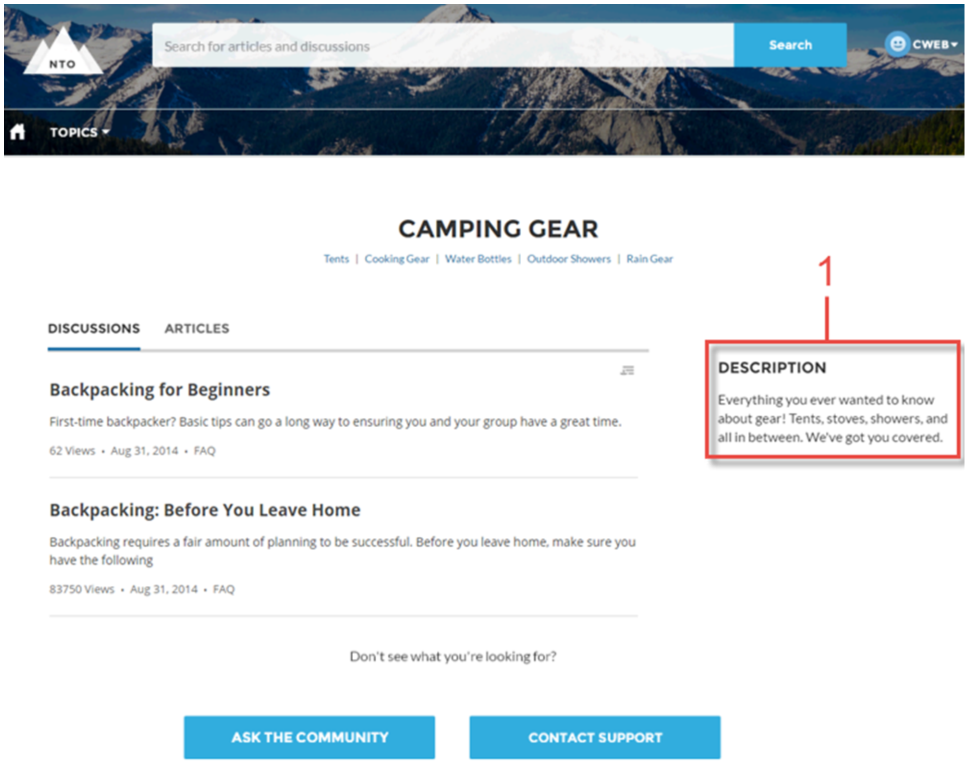
Topic Description

The Topic Description component is used on the Topic Detail page in the Customer Service template. It shows the topic's description as entered in **Content Management** > **Topics**.

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

Property	Details
`Topic ID`	The system supplies this value, and populates the component with the description tied to the topic shown on the topic detail page.
`Title`	Enter text for the title. The default text is `Description`.

Example: Sample Topic Description component.



SEE ALSO:

Which Components Can I Use with Each Aura Template?

Topic Metrics

The Topic Metrics component lets users see how often site members use a topic.

You can show the number of posts, articles, and followers that a topic has, and how many people have used the topic in the last 60 days. Use the Topic Metrics component on the Topic Detail page.

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

Property	Details
`Show Posts`	Enable this setting to show the number of posts tagged with the topic. For navigational topics, the number of posts includes posts tagged with the topic and posts tagged with subtopics. Note: The number of posts that use the topic can be inaccurate but provides a good comparative measure of how often people use the topic in posts.
`Show Articles`	Enable this setting to show the number of articles tagged with the topic.
`Show Followers`	Enable this setting to show the number of people following the topic.

Property	Details
`Show how many people used the topic in the last 60 days.`	Enable this setting to show how many Experience Builder site members have used the topic in the past 60 days.
`Topic ID`	This field populates dynamically with the topic ID.

Topics

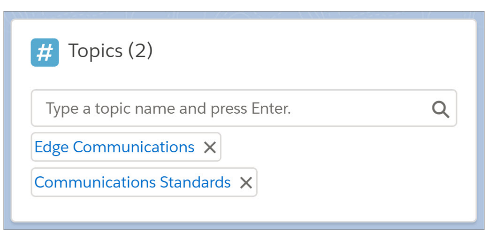
The Topics component allows your site members to add topics to records to organize them by theme in your Experience Builder site.

Add the topics component to record detail pages for objects that have topics enabled.

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

Property	Details
`Title`	Enter a title for the component. The default text is *`Topics`*.
`Placeholder Text`	Enter placeholder text that appears in the topic editor to encourage members to enter topic names. The default text is *`Type a topic name and press Enter.`*
`Number of Topics Shown`	Enter the number of topics to show before the Show More link appears. The default number is *`10`*.

Example: Sample Topics component



Totals

The Totals component displays count summaries related to the site group, such as number of posts, members, and likes.

The Totals component displays as Summary on a page. It's visible only to users who have reporting permissions in orgs that have group engagement. You can also choose to make the component visible only to group managers.

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

Property	Details
`Group ID`	The group's ID. Typically, this field is populated when the page loads.
`Visible only to managers`	To make the chart visible only to group managers, select the box.

Example:

Trending Articles

The Trending Articles component displays the most popular articles in your site. You can display them sorted by category or just display the top articles regardless of category.

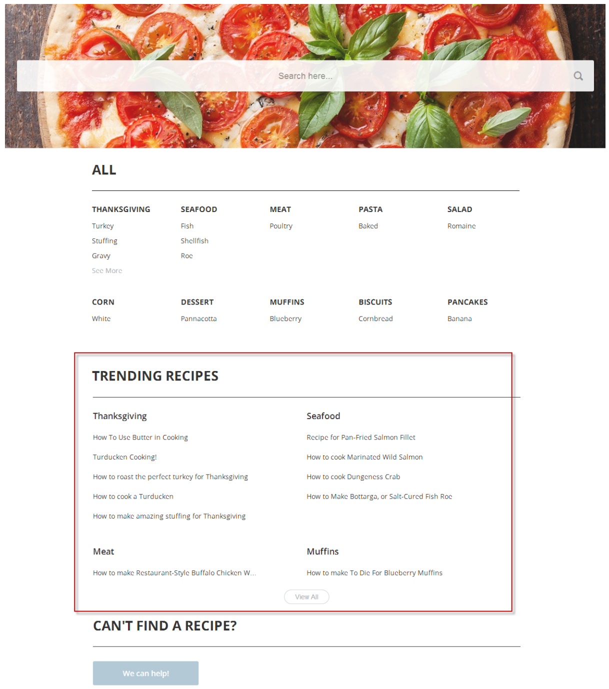
An article's popularity is based on the number of recent views. You can specify two different display options for this component:

- A two-column list of the top trending articles for the site.
- Two or more columns of trending articles sorted by data category. When a data category doesn't have any articles that are trending, it doesn't appear in the list.

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

Property	Details
`Category Name`	The top-level category that contains the subcategories for articles is automatically set using an expression that uses the top-level category you specified in the template's Custom Properties.
`Number of Articles`	Enter the maximum number of articles to display in the component. If you are using the two-column view with images, this will be the total number of articles that appear in the component. If you choose to display articles by data category, this will be the number of articles per child category.
`Number of Categories`	Enter the maximum number of categories to display in the component. This value controls whether the trending articles are organized by category or not: • To view a list of trending articles that isn't organized by categories, type *0* in the field. • To view trending articles organized by data category, specify the number of categories to display. Note: If you specify a parent category that has no children, the component will display the trending articles without categories even if you specify a number in this field.
`Title`	Enter a title for the component. The default text is *Trending*.

Example: Sample Trending Articles component:



SEE ALSO:

Which Components Can I Use with Each Aura Template?

Trending Articles by Topic

The Trending Articles by Topic component displays the most popular articles in your Experience Builder site organized by topic.

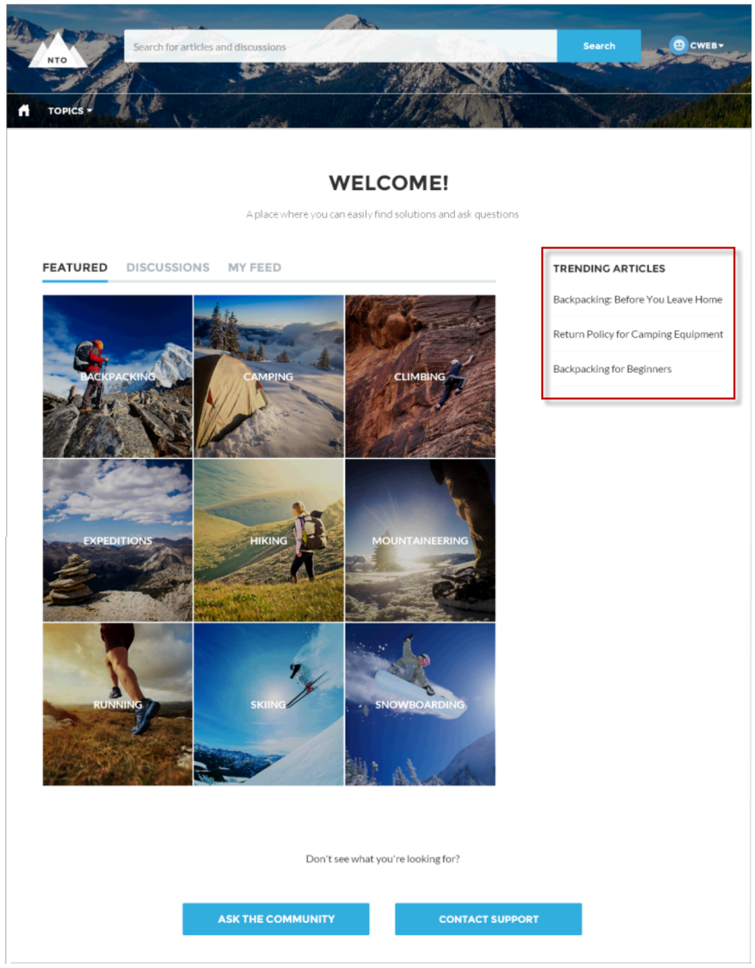
Note: Before Spring '16, this component was named Topic Trending Articles.

An article's popularity is based on the number of recent views.

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

Property	Details
`Title`	Enter the text that is the title for the component. The default text is *`Trending Articles`*.
`Number of Articles`	Enter the maximum number of trending articles to display.
`Topic ID`	The ID from the topic that the user selects to display the list of articles. To display articles from all managed topics, leave this field blank.

Example: Sample Trending Articles by Topic component:



SEE ALSO:

Which Components Can I Use with Each Aura Template?

Trending Topics

The Trending Topics component displays the popular topics in your Experience Builder site.

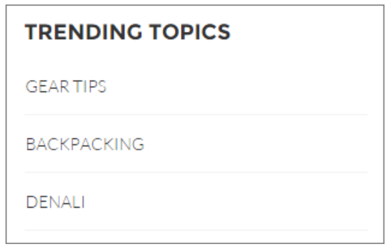
In the Page Editor, you can configure the Trending Topics component on the Home page.

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

Property	Details
`Title`	Enter a title for the list of trending topics. The default text is `Trending Topics`.
`Number of Topics`	Enter the number of trending topics to display. You can display a maximum of five topics at a time.

Property	Details
`Show the number of people using the Topic`	To show the number of people who are using the topic, check the box.

Example: Sample Trending Topics component:



SEE ALSO:

Which Components Can I Use with Each Aura Template?

Record Related List

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

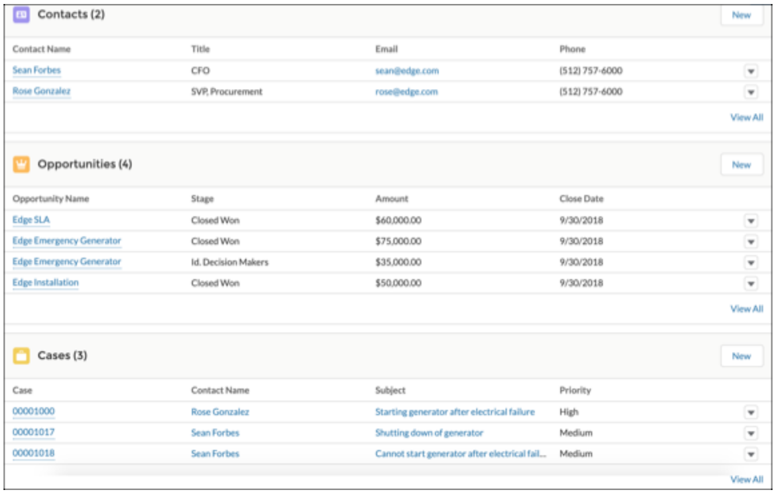
When a user expands the list of related records, the Record Related List page is displayed, which uses the Record Related List component under the hood. The component can occasionally be empty. For example, if there aren't any records related to the current record, or if the current record was created in the last 24 hours, no related items populate the component.

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

Property	Details
`Record ID`	(Required) The ID of the parent record.
`Layout Design`	Lay out width options to accommodate main body or narrow column placement of component.

Note: Related Lists for Campaign members have quick filters to narrow your results for fast results, but the resulting views can't be saved or shared.

Example: Sample Related Record List component:



Note: Record Related List row-level actions aren't available on mobile for Experience Builder sites.

SEE ALSO:
Which Components Can I Use with Each Aura Template?
Which Components Can I Use with Each Aura Template?

Unanswered Questions

The Unanswered Questions component lets users see the most viewed unanswered questions in a site. The component shows the top unanswered questions based on the view count across the site. As questions are answered, they are removed from view.

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

Property	Details
`Title`	The title of the component. The default text is *`Do you have the answer?`*.
`Number of Questions`	Enter the number of questions to show on the list. The default is 5.
`Show views`	Show the number of times the question has been viewed by users.

User Profile

The User Profile component shows detailed information about a user. Details include contact information, profile photo, Chatter statistics, topics the user is knowledgeable about, who the user is following, and the user's followers.

The User Profile component uses a two-column layout by default. Profile details and the profile image are always shown, but you choose if you want to show related lists, Chatter statistics, and Knows About. You can also customize labels.

The layout of the component makes it ideal for viewing your site on a mobile device. When viewed on a mobile device or tablet, the component uses a single-column layout with four tabs: Feed, Cases, Details, and Related. The Cases tab is visible only when users view their own profile. You can edit all tab labels.

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

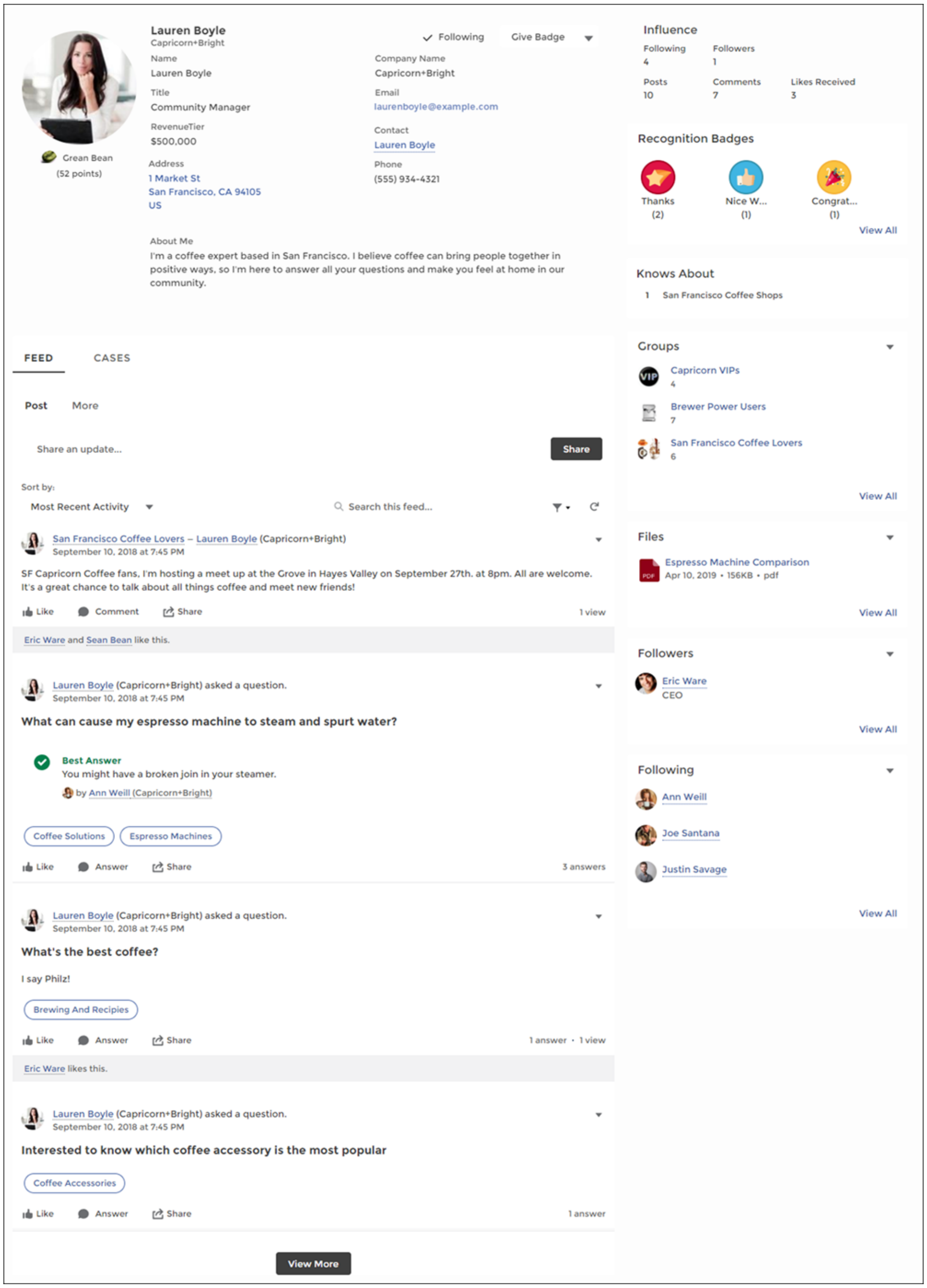
If you prefer, you can create a custom layout with more granular control over the placement of user profile content. Create a custom site page, and use the profile components to build your own version of a profile. Profile components include the User Profile Summary, User Profile Tabs, User Profile Statistics, User Profile Knows About, and User Profile Related List components.

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

Property	Details
`User ID`	The system supplies this value so that authenticated users can view their own information. Don't update this field.
`Show All Updates as the Default Feeds Filter`	When this box is selected, the feed automatically defaults to the All Feeds filter. If it isn't selected, the feed defaults to the Posts Created by this User filter.
`Show Influence`	Determines if the user's Chatter statistics are shown. Statistics include number of posts and comments, likes received, followers, and people they're following.
`Influence Label`	Enter a title for the Influence list. The default text is `Influence`.
`Show Knows About`	Determines if the Knows About list is shown.
`Knows About Label`	Enter a title for the Knows About list. The default text is `Knows About`.
`Maximum Topics in Knows About Displayed (up to 10)`	Enter the maximum number of topics listed for each user in the Knows About list, up to a limit of 10.
`Show Recognition Badges`	Determines if the Recognition Badges card is shown.
`Recognition Badges Label`	Enter a title for the Recognition Badges card. The default text is `Recognition Badges`.
`Button Text`	Enter the text you want to display on the button for awarding badges to other users. The default text is `Give`.
`Show Related Lists`	Determines if related lists are shown. Related lists can include Followers, Following, Groups, and Files.
`Feed Tab Label`	Enter the text you want to display on the tab that users select to view a user's Chatter feed. The default text is *`Feed`*.
`Cases Tab Label`	Enter the text you want to display on the tab that users select to view their cases. This only displays for users on their own profile. The default text is *`Cases`*.
`Cases Tab Header Label`	Enter the text for the label that appears at the top of the list of cases. The default for this field is `My Cases`.

Property	Details
`Case Filter Name or ID`	Enter the name of the list view that displays cases.
`Create Case Label`	Enter the text you'd like to display on the button that users can click to create a case. The default text is `Create Case`.
`Record Details Tab Label (Mobile only)`	Determines if a record details tab appears. Record details include profile details, Knows About, and Influence. The default label is `Details`. Available only when a site is viewed on a mobile device.
`Related Records Tab Label (Mobile only)`	Determines if a related records tab appears, such as Groups, Files, Followers, and Following. The default label is `Related`. Available only when a site is viewed on a mobile device.

Example: Sample User Profile component



SEE ALSO:

[Which Components Can I Use with Each Aura Template?]

User Profile Detail

The User Profile Detail component shows details about a user including contact information, profile photo, Chatter statistics, and topics the user is knowledgeable about. On other users' profiles, it also shows a Follow button.

Note: Before Spring '16, this component was named User Profile Body.

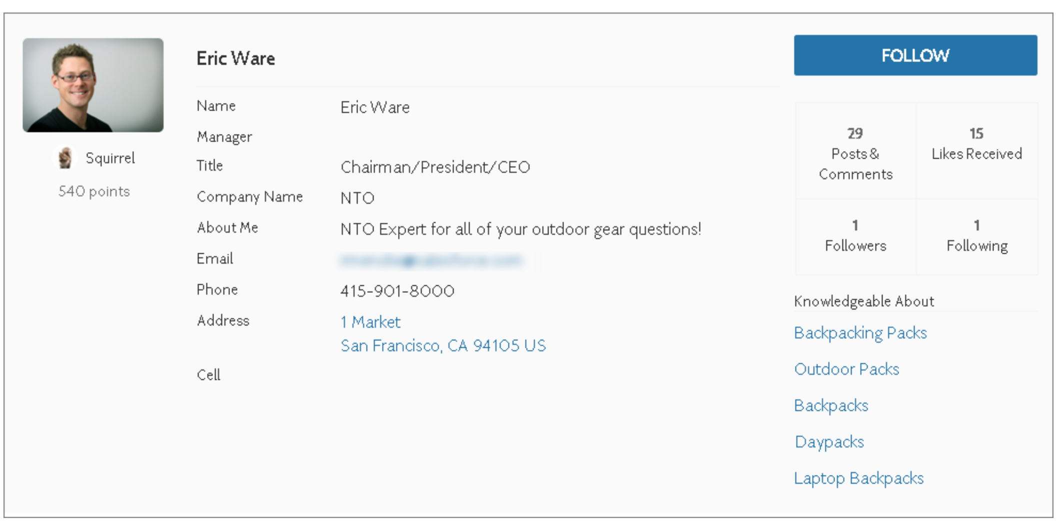
Chatter statistics for the site include number of posts and comments, likes received, followers, and people the user is following. Knowledgeable About shows top topics that people know about, so the site can quickly see areas of expertise. Topic knowledge is calculated based on factors such as best answers, mentions, or likes on questions and posts.

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

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

Property	Details
`User ID`	The system supplies this value so that authenticated users can view their own information. Don't update this field.
`Show Influence Section`	To show the user's reputation scores under their photos, select the box.
`Show user's reputation score in the Influence section`	To show user's reputation scores in the Influence section, select the box. Otherwise, the user's reputations scores under their photos.
`Show Knows About`	Determines if the Knowledgeable About list is shown.
`Show Photo`	To show the user's photo, select the box.
`Display circular photo`	To apply a circular crop to user profile photos, select the box. Otherwise the crop is a square/rectangle. Users may must reload their photos so that they fit inside in the cropped area.
`Maximum Topics Displayed`	Enter the maximum number of topics listed for each user, up to a limit of 10.

Example: Sample User Profile Detail component:



By default, all the information in a user's profile is visible to all users in the site, including to unlicensed guest users accessing the site. To limit access to members' information, use a custom user profile page layout. Hide fields that reveal sensitive information, such as phone, email, title, and manager.

Note: Showing many user fields in a custom layout affects the performance of the profile view. We recommend showing no more than 8 fields.

Similarly, consider modifying the fields for unlicensed guest user profiles to show only the necessary information. For example, you could hide the manager field. For detailed instructions on customizing page layouts, see Salesforce Help.

Add Actions to Your User Profile

There are five available actions that can be added to a User Profile component in your site. These actions include: Freeze, Follow, Edit, Message, and Give Badge.

Note: Only the Follow action is turned on by default.

To modify your user profile actions in Lightning Experience,

1. Access the Salesforce Setup menu.
2. Go to **Object Manager** and select **Users**.
3. Click **User Page Layouts**.
4. On the **Mobile and Lightning Actions** tab, choose which buttons to display by dragging them into the **Salesforce Mobile and Lightning Experience Actions** section.
5. Save your layout.

Actions appear in a dropdown on the User Profile component and are displayed in the order you add them to the layout.

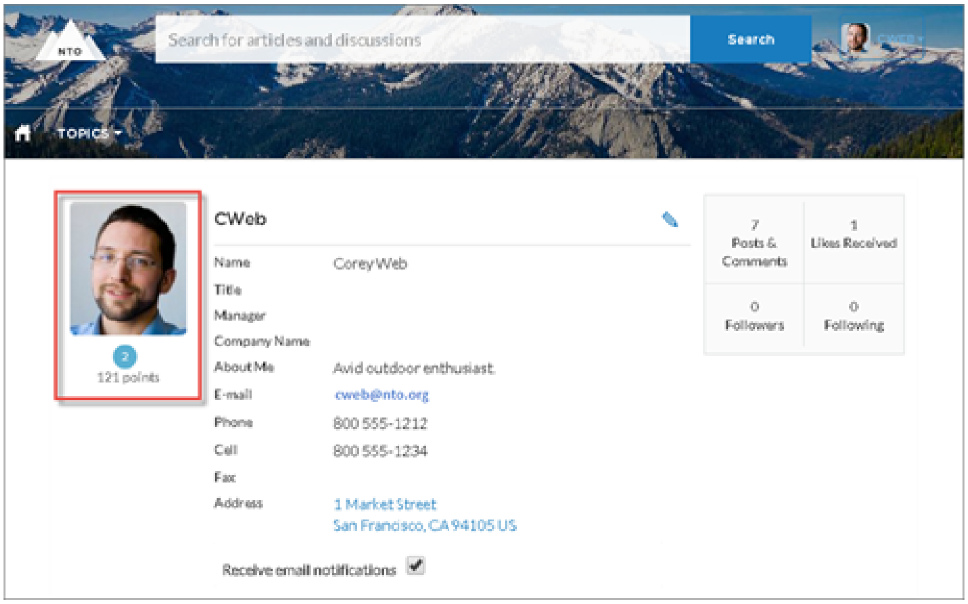
User Profile Image

The User Profile Image component displays the user's reputation level, reputation points, and profile photo.

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

Property	Details
`User ID`	The system supplies this value so that authenticated users can view their own information. Don't update this field.
`Display circular photo`	To apply a circular crop to user profile photos, select the box. Otherwise the crop is a square/rectangle. Users may must reload their photos so they fit in the cropped area.
`Display Reputation`	To display reputation level below the user profile photo, select the box.

Example: Sample User Profile Image component:



SEE ALSO:

Which Components Can I Use with Each Aura Template?

User Profile Knows About

Allow site members to endorse and recognize experts using the widget directly on a member's profile page.

Once you have enabled Knowledgeable People, site members can endorse one another for both new and existing topics on their site's user profile page. The profile page displays all the topics the site member is knowledgeable about.

Use the component to enter a new topic for endorsement. You can also view the number of endorsements that have been received for each topic that a member has been marked knowledgeable about. To add or remove endorsements, members can click the thumbs up button. Site members aren't able to endorse themselves on any topic.

Note: Before Summer `16, this component was named Knowledgeable About. The component name for sites built before Summer `16 remains Knowledgeable About.

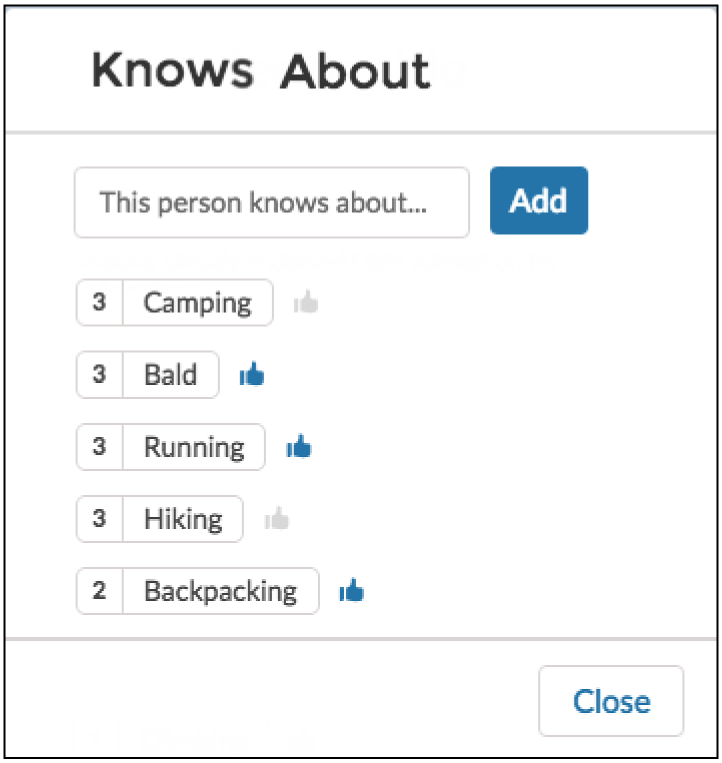
1. Do one of the following:
   - To display the Knows About list within the User Profile component, select that component.
   - To display the list elsewhere on the profile page, drag the User Profile Knows About component to the desired location.
2. In the property editor, configure properties for the component:

Property	Details
`User ID`	The user profile ID. Typically, this field is automatically populated with the record ID when the page loads.
`Title`	Enter a title for the component. The default text is `Knows About`.

Property	Details
`Maximum Topics Displayed`	Enter the maximum number of topics listed for each user, up to a limit of 10.

Note: Site members can't opt out of being shown as knowledgeable about specific topics.

Example:



SEE ALSO:

Which Components Can I Use with Each Aura Template?

User Profile Related List

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

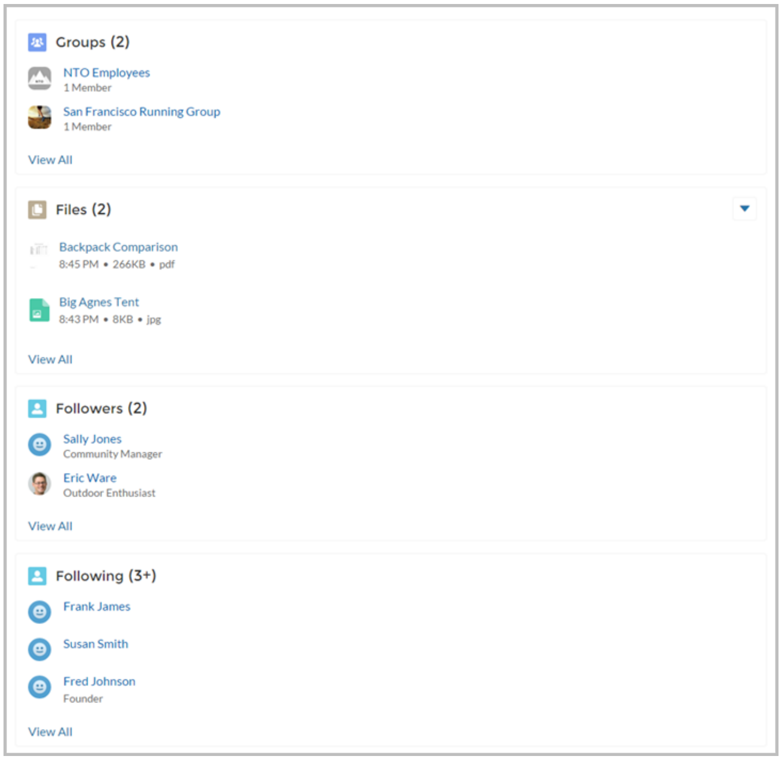
Add the User Profile Related List component to the User Profile page to show a user's related lists. Users can view full details for a related list by clicking **View All** at the bottom of the list. On the Files related list, users can click to upload a file.

You can customize which related lists are visible in your site by editing the User Profile page layout.

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

Property	Details
`User ID`	The system supplies this value. Don't update this field.

Example: Sample User Profile Related List component



SEE ALSO:

Which Components Can I Use with Each Aura Template?

User Profile Menu

The User Profile Menu component displays a user's name (or nickname) and profile picture. It also displays a dropdown from which users can navigate to their profile, open a case, access their locale and email notification settings, and log out. External users can also access and manage their account. If the user isn't logged in, a Login button appears in the header.

Important: The User Profile Menu component replaces the Profile Header component in sites based on Winter '18 and later versions of Experience Builder templates.

Users can't customize the profile photo functionality in the profile menu. Instead, they edit all profile information from the profile details page.

Note: If displaying a nickname is enabled in the site, this component shows the nickname instead of the user's name. The user's reputation level displays only if reputation is enabled in the site.

1. In the page you're configuring, select the **User Profile Menu** component.

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

Property	Details
`Case Filter Name or IkD`	The name or ID of the list view that displays the user's cases. This value is used throughout the site to display the user's list of cases. Note: By default, the template uses the AllOpenCases view, which lets users view any open cases that they have permission to see. Configure sharing to ensure that users see only cases that belong to them. Alternatively, you can use another pre-defined list view or create a custom list view.
`Include Contact Support`	Select to include the option to contact an agent from the profile.
`Home Label`	Enter the text shown for the link to the site home page from the user navigation menu. The default is Home.
`Include My Messages`	Include a **My Messages** link in the profile menu, which shows the number of unread messages in the menu and opens the Messages page when clicked.
`My Profile Label`	Enter the text shown to indicate a user's profile. The default is My Profile.
`Contact Support Label`	Enter the text for the link to the page where the user can open a case. The default is Contact Support.
`Login Label`	Enter the text for the link to log in to the site. The default is Login.
`Logout Label`	Enter the text for the link to log out from the site. The default is Log Out.
`Experience Builder Label`	Enter the text for the link to the Experience Builder page. The default is *`Experience Builder`*. This link appears only for users with permissions to manage the site.
`Site Setup Label`	Enter the text for the link to the setup page for sites. The default is Site Setup. This link is shown to users with permissions to create or modify the site's administration settings.
`User Settings Label`	Enter the text for the link to access an authenticated user's personal settings for the site. The default is My Settings.
`Show User Settings in Menu`	Select this option to show user settings in the profile dropdown list.
`My Account Label`	Enter the text for the link that external users click to view their account record. The default is My Account. This feature is available in the Spring '16 version of the Customer Service template and later. Note: External site members who access the My Account link see their account details based on the configuration of the Record Detail page.

User Profile Stats

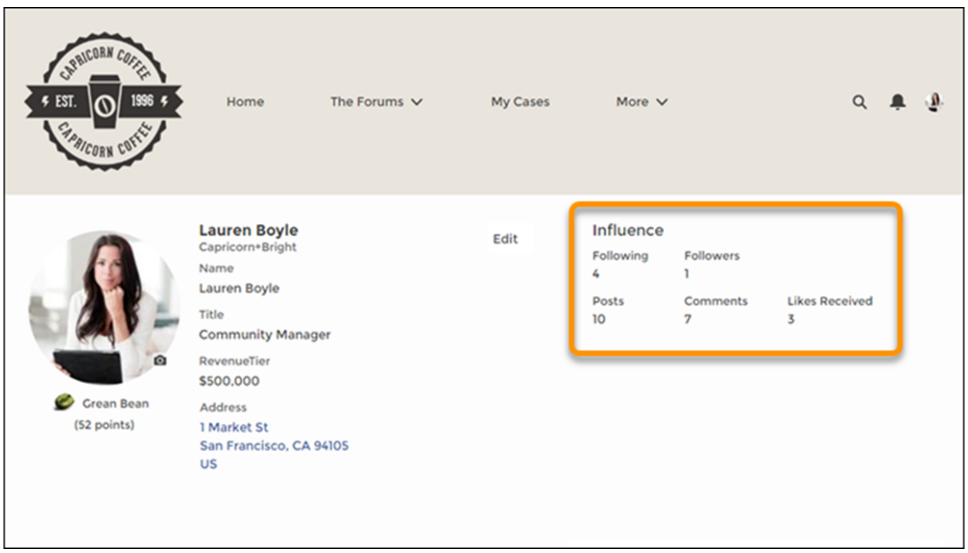
The User Profile Stats component displays many of the user's Chatter statistics for the community. Stats include the number of posts and comments made, likes received, followers, and people they're following.

The user statistics that appear in the User Profile Stats component are visible to all members of the community. This visibility lets community members see how active other members are.

1. Select the **User Profile Stats** component on the page.
2. In the property editor, configure properties for the component:

Property	Details
`User ID`	Don't update this field. The system supplies this value.
`User Stats Title`	Title of the component. The default value is *`Influence`*.
`Display Reputation`	To display the reputation level, check the box.

Example: Sample User Profile Stats component:



SEE ALSO:

Which Components Can I Use with Each Aura Template?

User Profile Summary

The User Profile Summary component displays the user's contact information, title, address, and manager's name. If nickname display is enabled for the site, other users' nicknames are shown in place of the full name. The full name is shown when users view their own profiles.

Note: Before Spring '16, this component was named User Profile Detail.

By default, all the information in a user's profile is visible to all users in the site, including to unlicensed guest users accessing the site. To limit access to members' information, use a custom user profile page layout. Hide fields that reveal sensitive information, such as phone, email, title, and manager.

Note: Showing many user fields in a custom layout affects the performance of the profile view. We recommend showing no more than 8 fields.

Similarly, consider modifying the fields for unlicensed guest user profiles to show only the necessary information. For example, you could hide the manager field. For detailed instructions on customizing page layouts, see Salesforce Help.

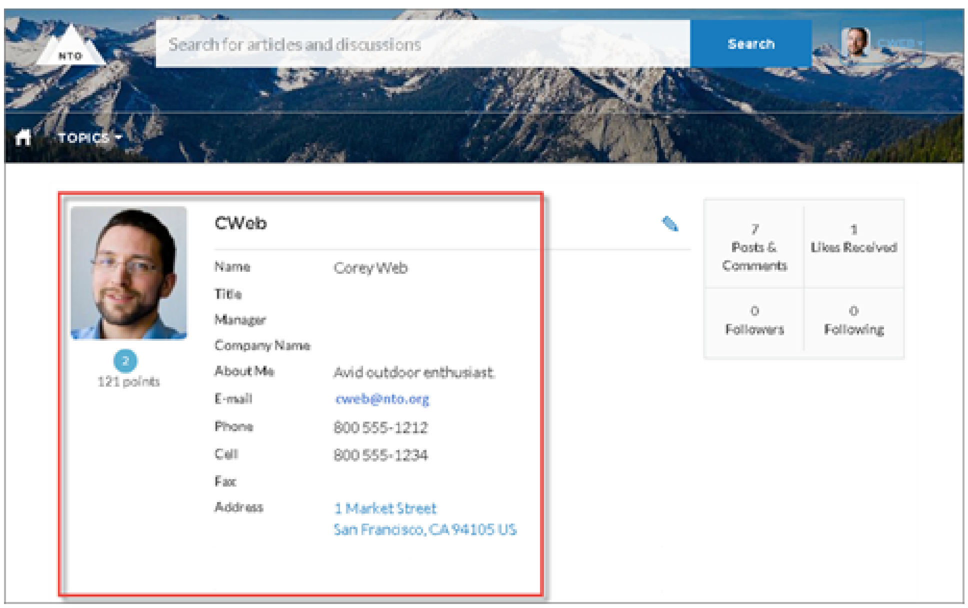
You can add the User Profile Summary component to the Profile page. This component allows users to edit their profile information from the site. When viewing another user's profile, you can click their address to see a Google map of their location.

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

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

Property	Details
`User ID`	The system supplies this value so that authenticated users can view their own information. Don't update this field.

Example: Sample User Profile Summary component:



SEE ALSO:

Which Components Can I Use with Each Aura Template?

User Profile Summary & Image (Deprecated)

The User Profile Summary & Image component displays a user's photo, contact information, reputation level, title, and manager's name. If nickname display is enabled for the site, the nickname is shown in place of the full name when a user views another user's profile. The full name is shown when a user views their own profile.

Note: Before Spring '16, this component was named User Profile Header Detail. In Winter '21, this component was deprecated. Use the User Profile Summary and User Profile Image components instead.

By default, all the information in a user's profile is visible to all users in the site, including to unlicensed guest users accessing the site. To limit access to members' information, use a custom user profile page layout. Hide fields that reveal sensitive information, such as phone, email, title, and manager.

Similarly, consider modifying the fields for unlicensed guest user profiles to show only the necessary information. For example, you could hide the manager field. For detailed instructions on customizing page layouts, see Salesforce Help.

Users in Koa and Kokua sites access the user profile detail by viewing their own profile or clicking another member's name. In their own profile, users can click the pencil icon to edit their contact information. In another user's profile, users can click **Follow** to see the user's community activity directly in their feed. Clicking another user's address displays a Google map of their location.

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

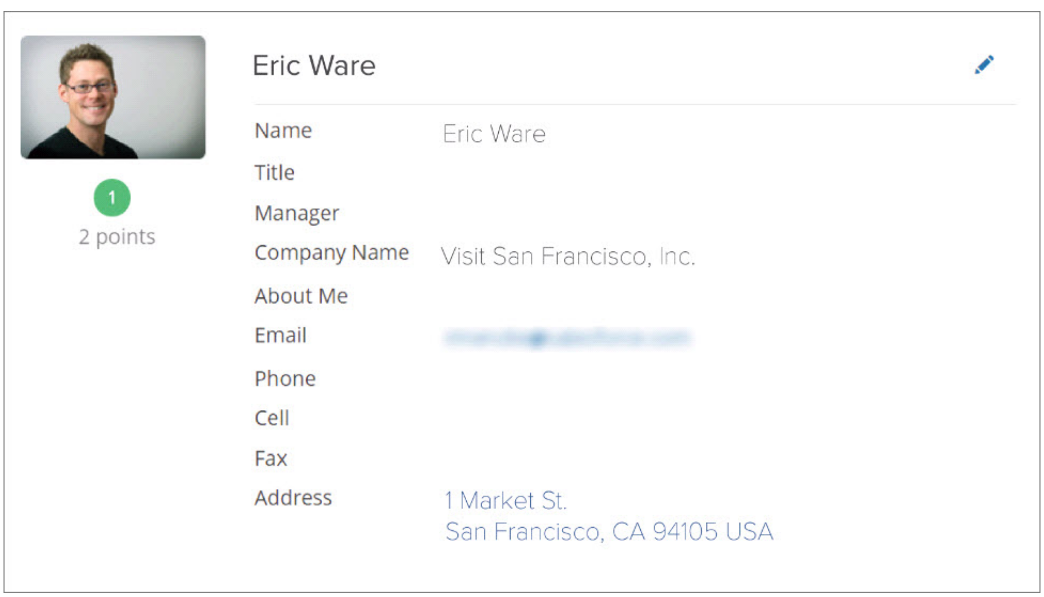
Important: To avoid issues, make sure that the User Profile Summary & Image component and the Case List component occupy different regions of the My Cases page. They occupy different regions by default, but it is a good practice to verify in your community.

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

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

Property	Details
`User ID`	The system supplies this value so that authenticated users can view their own information. Don't update this field.

Example: Sample User Profile Summary & Image component:



User Profile Tabs

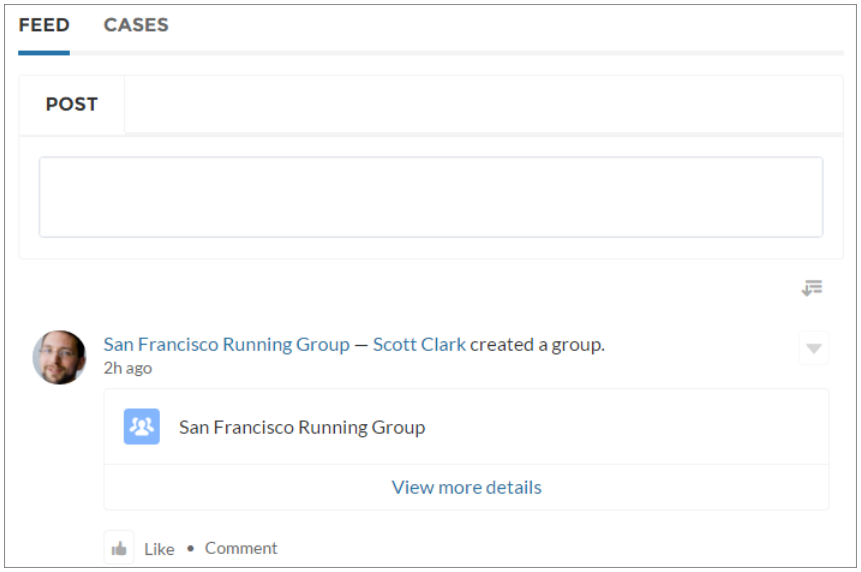
The User Profile Tabs component lets users see their feed and cases on their profile. They can also post to their feed directly from their profile. When viewing another user's profile, they see the user's activity but not their cases.

On desktops and tablets, users see a list view of up to 25 of their most recent cases. They can sort columns in the list and click the case number to view the details of that case. Navigation arrows let them click through the list of cases when there are multiple pages. On mobile devices, the view is optimized and users scroll through a list of cases and select a case to see its details.

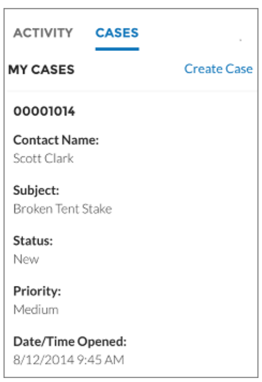
1. Select the **User Profile Tabs** component in the page you're configuring.
2. In the property editor, configure properties for the component:

Property	Details
`User ID`	The system supplies this value. Don't update this field.
`Feed Tab Label`	Enter the text you want to display on the tab that users select to view a user's Chatter feed. The default text is *`Feed`*.
`Cases Tab Label`	Enter the text you want to display on the tab that users select to view their cases. This only displays for users on their own profile. The default text is *`Cases`*.
`Case Filter Name or ID`	Enter the name of the list view that displays cases. Note: By default, the template uses the AllOpenCases view, which lets users view any open cases that they have permission to see. Configure sharing to ensure that users see only cases that belong to them. Alternatively, you can use another pre-defined list view or create a custom list view.
`Header Title`	Enter the text for the label that appears at the top of the list of cases. The default for this field is `My Cases`.
`Create Case Label`	Enter the text you'd like to display on the button that users can click to create a case. The default text is `Create Case`.
`Show All Updates as the Default Feeds Filter`	When this box is selected, the feed automatically defaults to the All Feeds filter. If it isn't selected, the feed defaults to the Posts Created by this User filter.

Example: Sample User Profile Tabs component:



Case list viewed on a mobile device:



SEE ALSO:

Which Components Can I Use with Each Aura Template?

User Settings (Deprecated)

The User Settings component displays a user's username, email address, language, locale, time zone, profile visibility, and email notification settings. User settings are only available for authenticated users.

Note: In Summer '19, the Customizable User Settings component replaces the User Settings component. In Winter '21, this component was deprecated. Use the Customizable User Settings component instead.

On the User Settings component, users can change their language, locale, and time zone so that the site is localized appropriately. A user can also see their username and change their email or password. Users can choose to show their profile details to guest users who aren't logged in to the site. Users can also choose to receive email based on events in the site. If users don't want to receive email about events in the site, they can disable email notifications.

1. Select the **User Settings** component in the page you're configuring.

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

Property	Details
`User ID`	The system supplies this value. Don't update this field.
`Hide email notifications setting`	Prevents email notifications from appearing in a user's personal Chatter settings.
`Hide the Connected Sources tab`	Prevents the Connected Sources tab from appearing on the User Settings component.

Tip: For orgs where Single Sign-On (SSO) is enabled, you may also want to hide the Change Password link in a user's My Settings page.

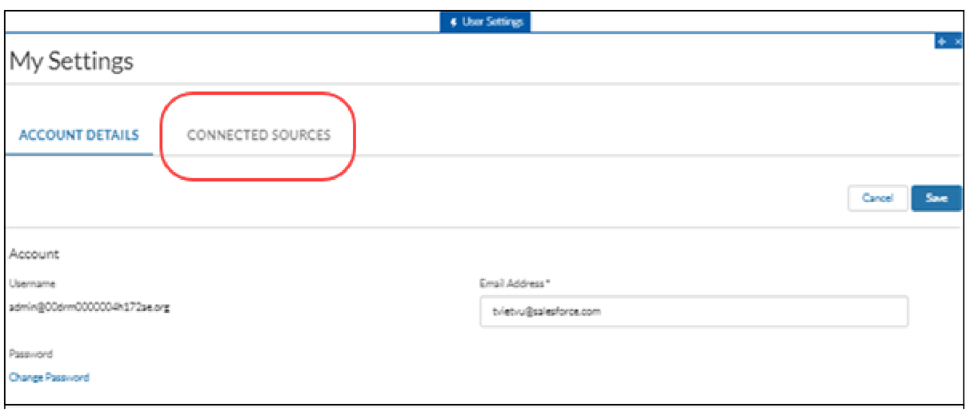
a. Create a permission set, for example *`Single Sign On Link`* in Setup.

b. Set "Is Single Sign-On Enabled" to *`On`* in System permissions.

c. Assign the permission set to appropriate users in your org.

"Change password" page no longer appears on their My Settings page.

Example: Partial view of the User Settings component with the Connected Sources tab called out:



SEE ALSO:

Which Components Can I Use with Each Aura Template?

User Permissions

Visualforce Page Component

Use the Visualforce Page component to add existing Visualforce pages to the pages of your Experience Builder site.

Note: The Visualforce Page component only supports the `navigateToURL` function. Relative and absolute URLs are supported. Relative URLs are relative to the site domain, and retain navigation history. External URLs—that is, URLs that are outside the site domain—open in a separate browser window.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin, publisher, or builder in that site

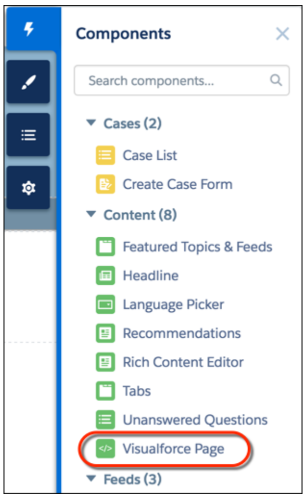
To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

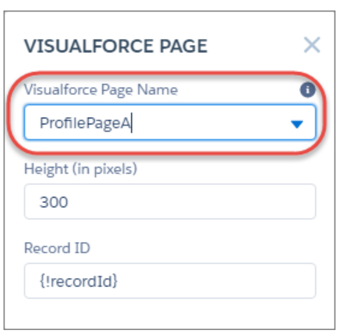
  OR

- Be a member of the site AND an experience admin or publisher in that site

1. In Experience Builder, drag the Visualforce Page component from the Components panel onto the page.



2. Edit the component to select the Visualforce page to use. If you installed the Salesforce CPQ (Steelbrick) app, those pages are also available for selection here.



3. Adjust the height as you like.
4. Optionally, specify a Record ID if the Visualforce page. Typically, the system populates this value depending on context.

   Tip: If the Visualforce page requires the Record ID from an object such as Account, create object pages for Account. Then drag the Visualforce Page component onto the object's detail page. The Record ID field adjusts to the object's ID.

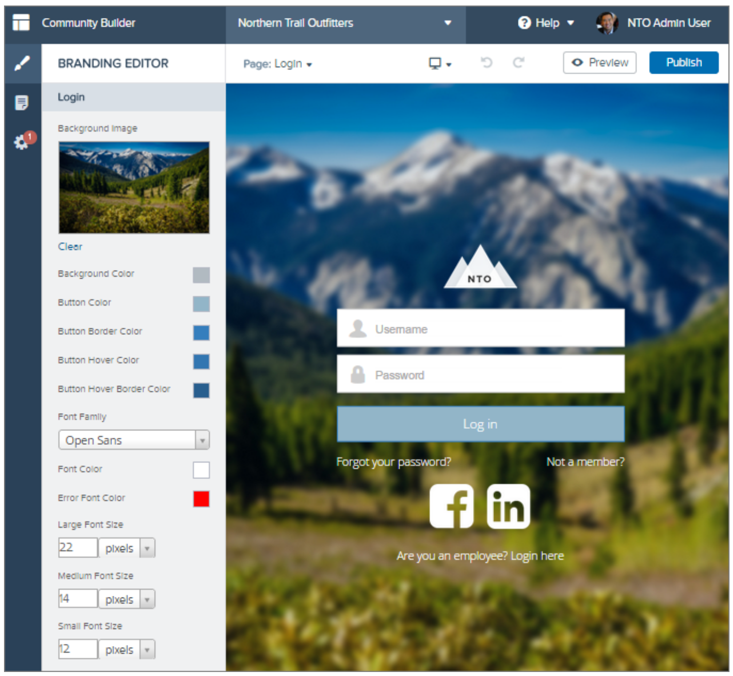
Login Components

Brand the Login Pages

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

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

Example: The Branding Editor settings in Experience Builder:



Warning: When you customize a login page or any page that includes fields with sensitive or confidential information with Experience Builder, we recommend that you use only standard components built by Salesforce or components that you built, customized, or vetted. Use of third-party components and code libraries on a page that includes fields with sensitive or confidential information can increase your risk for security vulnerabilities.

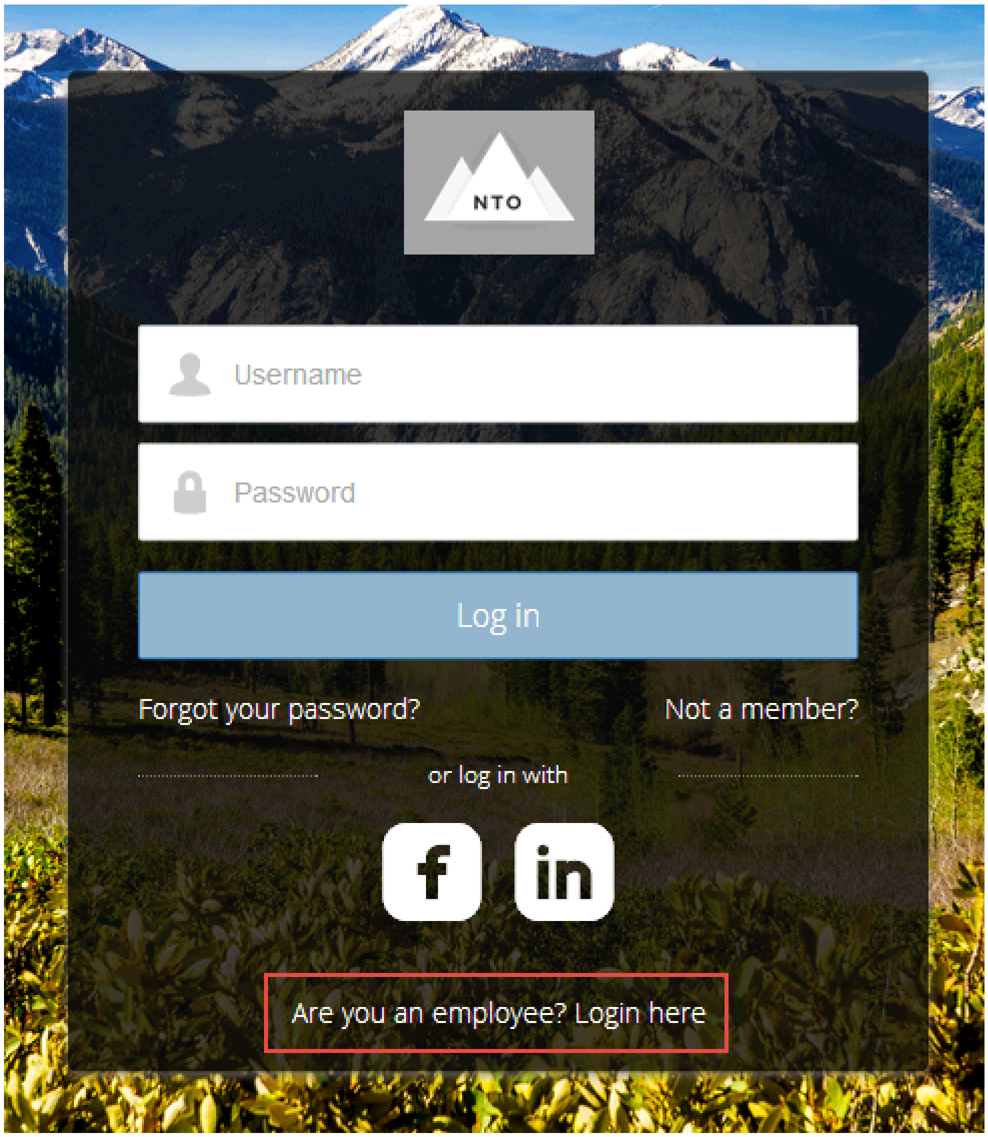
Employee Login Link

Use the Employee Login Link component to direct users with accounts in the site's parent org to their login page. When your employees or other users who have accounts in the parent org for the site end up on the site login page, you can redirect them to their own login page with a link. They can then log in with all the settings and permissions of their org account.

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

Property	Details
`Employee Login Link`	Enter text that identifies the login option for employees. The label appears as clickable text on the page. The default text is *`Are you an employee? Login here`*.

Example: Sample Employee Login Link component:



SEE ALSO:

Which Components Can I Use with Each Aura Template?

Forgot Password

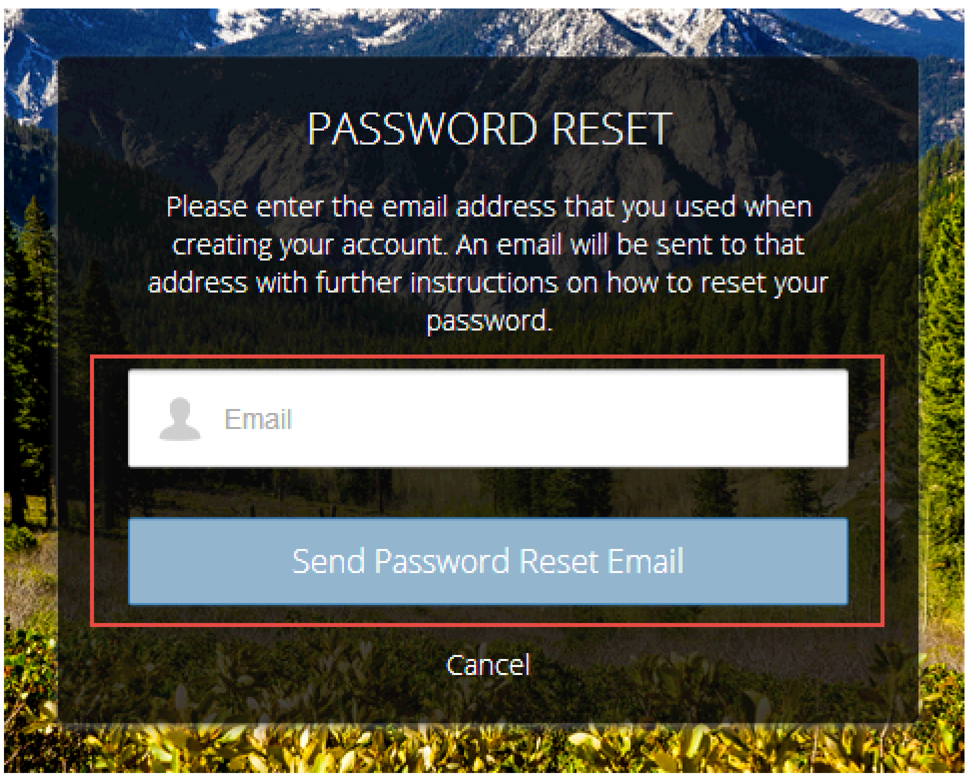
Use the Forgot Password component to let users request a new password.

Sometimes users forget their existing passwords and need a new one. The Forgot Password component gives users the ability to get one without contacting an administrator. The user enters the email address that's associated with the account, clicks the button, and gets email instructions for resetting the password.

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

Property	Details
`Check Email URL`	Enter the view or path to the page that notifies the user when the password has been reset and an email has been sent.
`Username Label`	Enter the text that appears in the field where the user enters a valid username, which can be in the form of an email address if users are identified that way.
`Submit Button Label`	Enter the text for the button that the user clicks to make the password reset request.

Example: Sample Forgot Password component:



SEE ALSO:

Which Components Can I Use with Each Aura Template?

Login Form

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

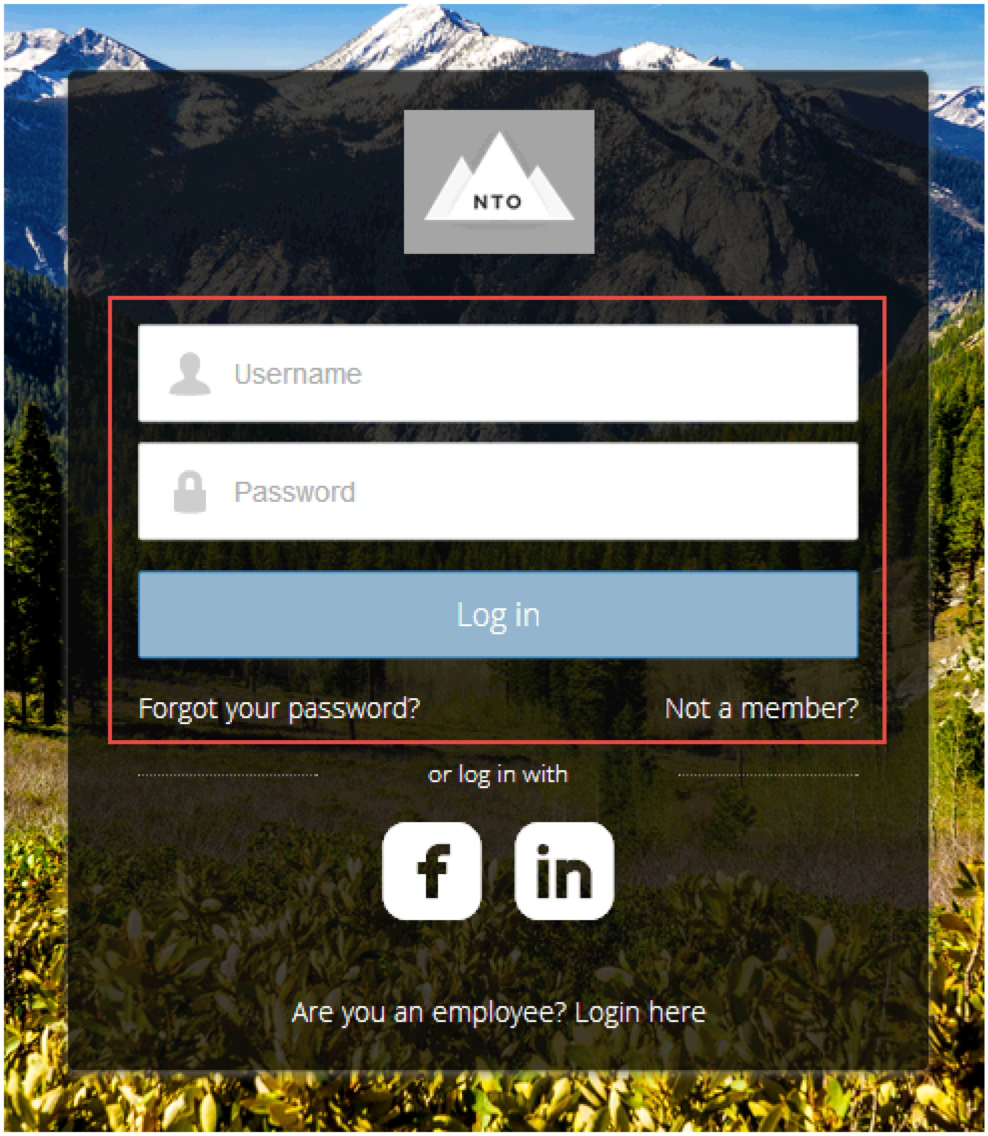
The **Login Form** component is a simple username and password form that lets users with an existing account log in to the site.

Note: If the site administrator deselects the username and password checkbox on the **Administration** > **Login & Registration** page in Experience Management, the Login Form doesn't appear in the published site. For more information, see "Customize Your Experience Cloud Site's Login Experience" in the Salesforce Help.

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

Property	Details
`Start URL`	Enter the path to the page that users see after they log in successfully. This is the home page for the site.
`Username Label`	Enter the text for the username field label. The default text is **Username**.
`Password Label`	Enter the text for the password field label. The default text is **Password**.
`Login Button Label`	Enter the text for the button that the user clicks to submit the login request. The default text is **Log in**.
`Forgot Password Link Label`	Enter the text for the link to the page where users can request a password reset. The default text is **Forgot your password?**
`Forgot Password URL`	Enter the page where users can request a password reset.
`Self Register Link Label`	Enter the text for the link to the page where users can complete a self-registration form. The default text is **Not a member?**
`Self Register URL`	Enter the page where users can complete a self-registration form.

Example: Sample Login Form component:



SEE ALSO:

Which Components Can I Use with Each Aura Template?

Self-Registration

The Self-Registration component lets users set up their accounts so that you don't have to add each one manually. Users put their information into the form fields, and when they click **Sign Up**, an account is created for them. This component has a basic set of fields that you can customize, and you can add more fields.

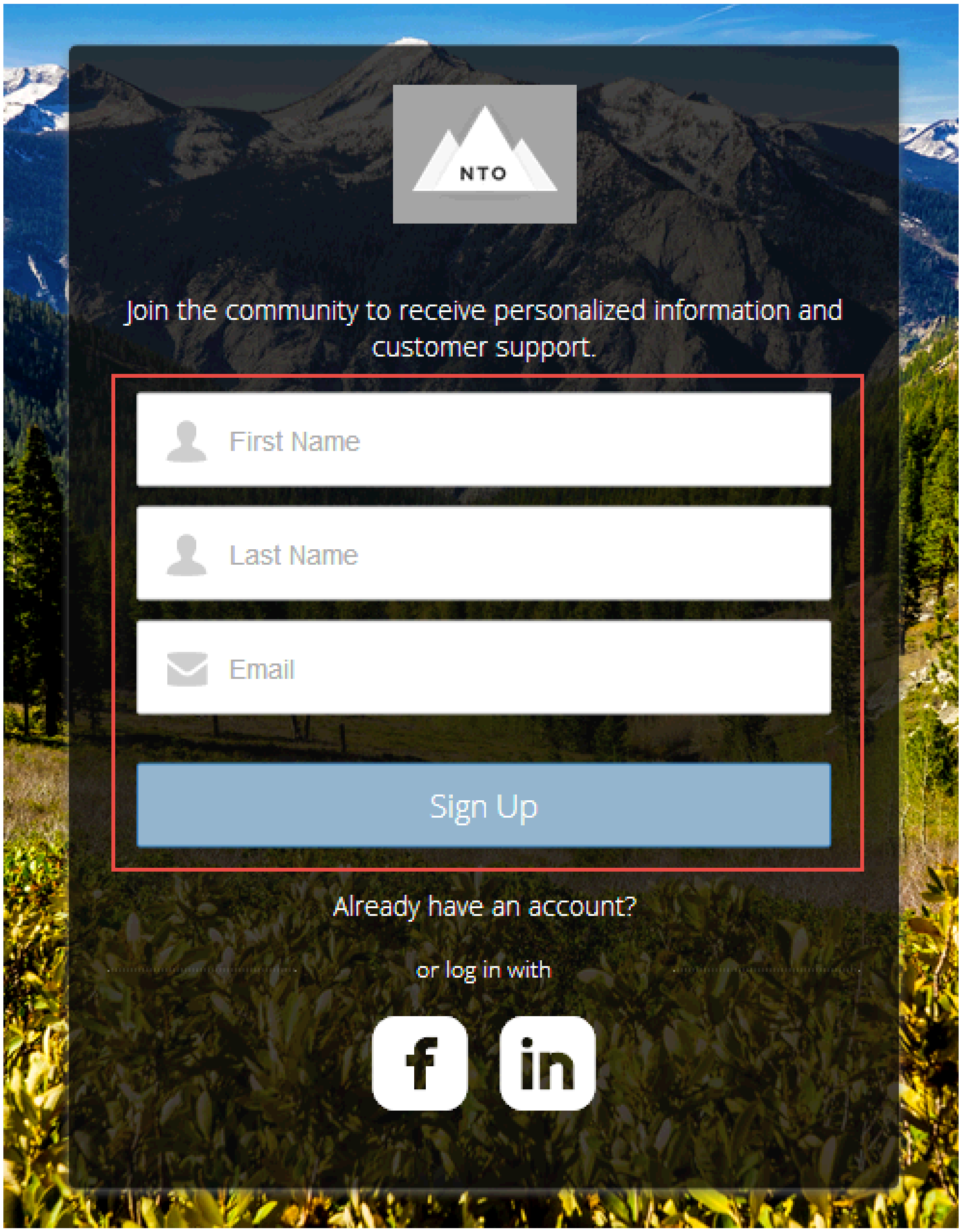
For this component to appear, go to Experience Management and select **Administration** > **Login & Registration** > **Allow external users to self-register**.

1. Select the **Self Registration** component in the page that you're configuring.

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

Property	Details
`Account ID`	Enter the variable expression for the account ID to associate with new users.
`Start URL`	Enter the path to the page that users see after they log in. This page is the home page for the site.
`Registration Confirmation URL`	Enter the path to the page to display after the user submits the self-registration form.
`First Name Label`	Enter the label text for the user's first name. The default text is **First Name**.
`Last Name Label`	Enter the label text for the user's last name. The default text is **Last Name.**
`Email Label`	Enter the label text for the user's email address. The default text is **Email**.
`Password Label`	Enter the text for the password field label. The default text is **Confirm Password**.
`Confirm Password Label`	Enter the text for the field in which a user confirms the password. This field usually requests that the user retype the proposed password to make sure that it's correct.
`Submit Button Label`	Enter the text for the button to submit the form values. The default text is **Sign Up.**
`Include Password Field?`	Select this option if you want self-registering users to pick their own passwords. Otherwise, password information is provided in the email that they receive after they submit the form.
`Extra Fields Field Set Name`	Optionally, add fields to the form. If you've created a field set by using our API, enter the variable that's associated with the field set here. For example, you can write code that creates a field set to collect a phone number or other information.

Example: Sample Self-Registration component:



SEE ALSO:

Which Components Can I Use with Each Aura Template?

Social Login

The Social Login component provides users with icons that they can click to log in to a third-party account, such as Facebook© or LinkedIn©. Set these icons for each authentication provider that you configure for the org.

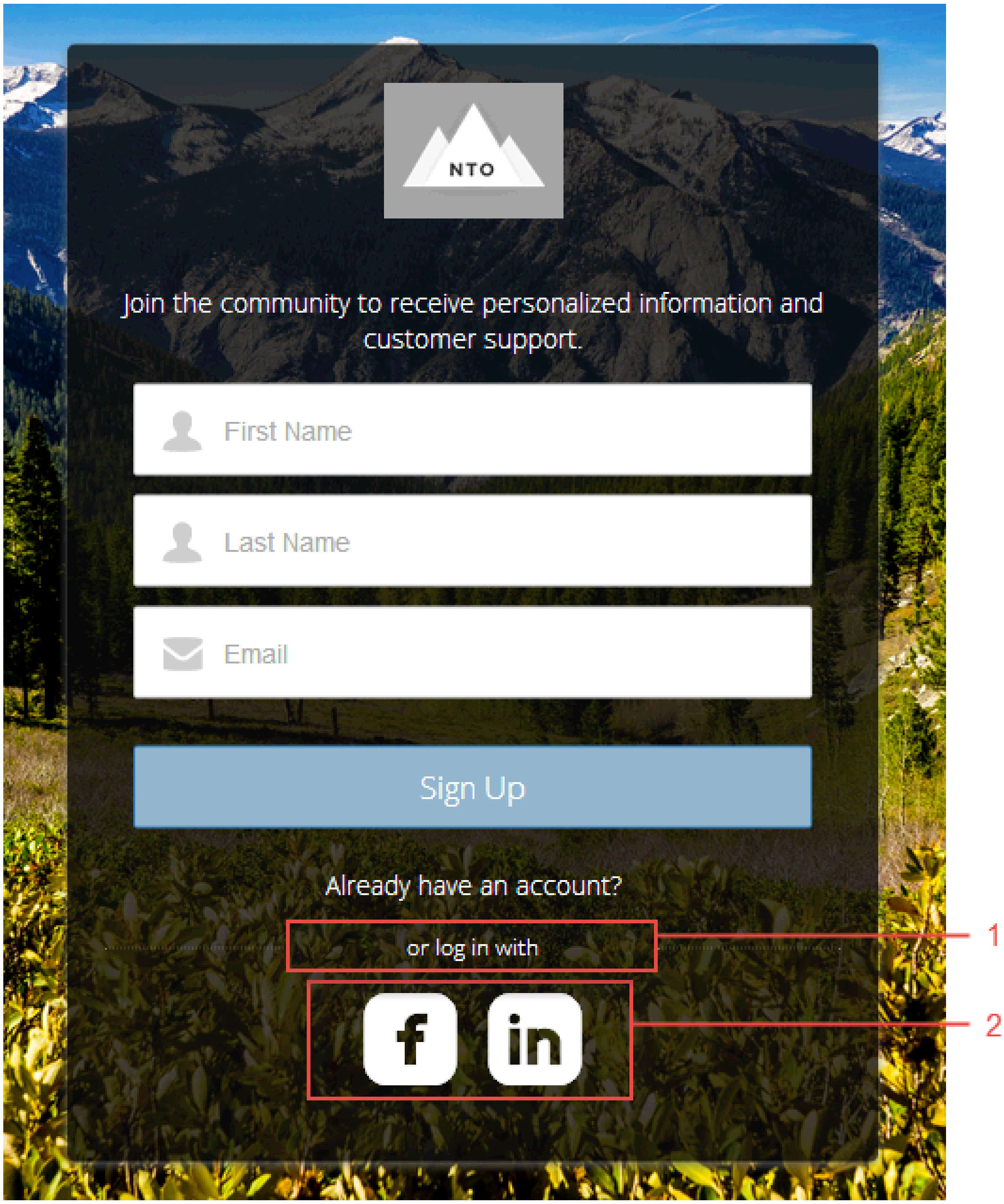
Some users prefer to use an existing account with a service such as Facebook to log in to the site instead of setting up a new account and password. The third-party service is an authentication provider that verifies the identification of the user. Use the Social Login component to add an icon for each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

Before you add the Social Login component, set up each authentication provider. For more information, see Configure Authentication Providers.

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

Property	Details
`Show Header`	Select this option to show a text header above the authentication header icons.
`Header Text`	Enter the text for the header text.
`Use Experience Builder site auth provider URLs`	Select this option to improve performance and reduce HTTP redirects by using site-specific URLs for single sign-on for all auth providers for your site. Copy the site's Callback URL in Auth. Providers in Setup. Make sure you update the callback URLs in your identity provider accordingly. If you don't select this option, Salesforce continues to use `login.salesforce.com` or `test.salesforce.com` to redirect to your site during SSO, which can result in decreased performance. Note: If you configure Apple as an external authentication provider, select this option to ensure that the Social Login component recognizes user information.

Example: Sample Social Login component with “or log in with” text (1) and authentication provider icons (2):



SEE ALSO:

Which Components Can I Use with Each Aura Template?

Customize Sites with Experience Builder

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

IN THIS SECTION:

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To create an Experience Cloud site:

- Create and Set Up Experiences AND View Setup and Configuration

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

Experience Builder Overview

Experience Builder and site templates let you create, brand, and publish a custom site that looks great on any mobile device! Choose a template to quickly start your site, and then style the pages to match your company's branding.

With Experience Builder, you can:

- Quickly style the site to match your company's branding.
- Edit site pages and components with the Experience Builder and customize their design and content.
- Preview your site and ensure that it appears correctly on different devices.
- Publish your changes so you can make them available to everyone in your site.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

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  OR

- Be a member of the site AND an experience admin or publisher in that site

IN THIS SECTION:

SEE ALSO:

Navigate Experience Builder

Experience Builder Settings

Navigate Experience Builder

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

To access Experience Builder:

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

In Experience Builder, you can:

- Drag and drop Lightning components onto your page (1). The Components panel includes custom Lightning components from AppExchange.
- Theme the site to match your organization's brand and style (2).
- View all the components on the current page (3). To edit a component's properties, select the component. You can also delete custom components and open them directly in the Developer Console.
- Edit site settings and accept updates to your site's template (4).
- Use the Experiences menu (5) to:
  - Go to the site after it's activated.
  - Open Experience Workspaces or Experience Management to manage site analytics, login, registration, reputation, topics, and other settings.
  - Return to **Setup**.
- Navigate to the site page that you want to edit using the **Pages** menu and clicking **Page Settings** > **Page Variation** (6). Manage, create, delete, and set the visibility of pages in Page Properties for each page.
- Refresh the current page (7).
- See how your site appears on different devices (8).
- Preview the site in a new browser window (9).
- Publish your changes to make your updates available to everyone in your site (10).

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

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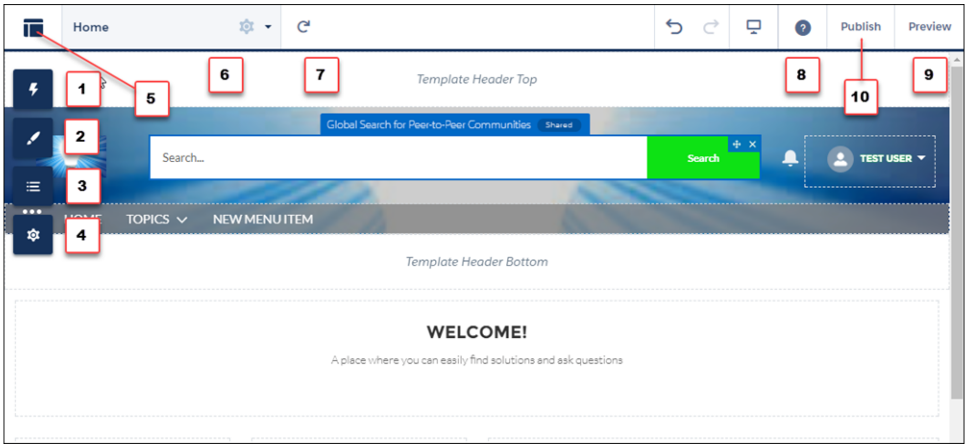
- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site



SEE ALSO:

[Experience Builder Overview]

[Experience Builder Settings]

Role-Based Access in Experience Builder

EDITIONS

Available in: Experience Builder sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Essentials, Performance, Unlimited, and Developer editions.

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

Use role-based access to control who does what in a community, portal, or site. Assign roles to your contributors with the level of access they need in a specific experience.

Contributors are users in your org that you add to your Experience Builder site. Specify what these contributors can do and see within the site by assigning them one of the following roles.

Experience admin

These contributors can do just about everything in an assigned Experience Builder site. They can access Experience Builder, can manage contributors, and publish the site.

Publisher

These contributors help you build and publish the assigned Experience Builder site. They can access Experience Builder and they can publish the site. They can't manage contributors. They have read-only access to the Experience Workspaces **Administration** > **Contributors** tab.

Builder

These contributors help build the assigned Experience Builder site. They can access Experience Builder. They can't publish the site or manage contributors. They have read-only access to the Experience Workspaces **Administration** > **Contributors** tab.

Viewer

These contributors have read-only access to Experience Builder in an assigned site. They can't publish the site or manage contributors. They have read-only access to the Experience Workspaces **Administration** > **Contributors** tab.

Note: Contributors assigned any access role level can't:

- Upload images in the Tile Menu component.
- Export templates, pages, or themes within Experience Builder.

Note: To ensure your contributors can access Experience Builder and Experience Workspaces in an inactive site, enable the "Modify All Data" permission.

In addition to the new roles, existing Salesforce admins have broad access to your Experience Builder sites.

Salesforce admin

A Salesforce admin can control all Experience Cloud settings, and can create communities, portals, and sites.

IN THIS SECTION:

Add Contributors to an Experience Builder Site

You can add users as contributors to a specific site by assigning them an access role. A contributor's access role is specific to that site, but a contributor can have different roles in different sites.

Update a Contributor's Access Role

You can update a contributor's access role to increase or decrease the level of access. A contributor's access role is specific to an Experience Builder site, so you must change the contributor's role in each assigned site separately. Experience admins can't change their own role.

Remove a Contributor from an Experience Builder Site

If a contributor leaves your company or is transferred to a different team, you can remove the contributor from a site. The user is removed from the Experience Builder site but not from Salesforce.

Add Contributors to an Experience Builder Site

You can add users as contributors to a specific site by assigning them an access role. A contributor's access role is specific to that site, but a contributor can have different roles in different sites.

1. In your site, go to Experience Workspaces and select the **Administration** tile.
2. Select **Contributors** tab (1) and click **Add Contributors** (2).

EDITIONS

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

USER PERMISSIONS

To access Experience Workspaces or Experience Builder:

- Create and Set Up Experiences

  AND

  Is a member of the site

To add, remove, or change a contributor access role:

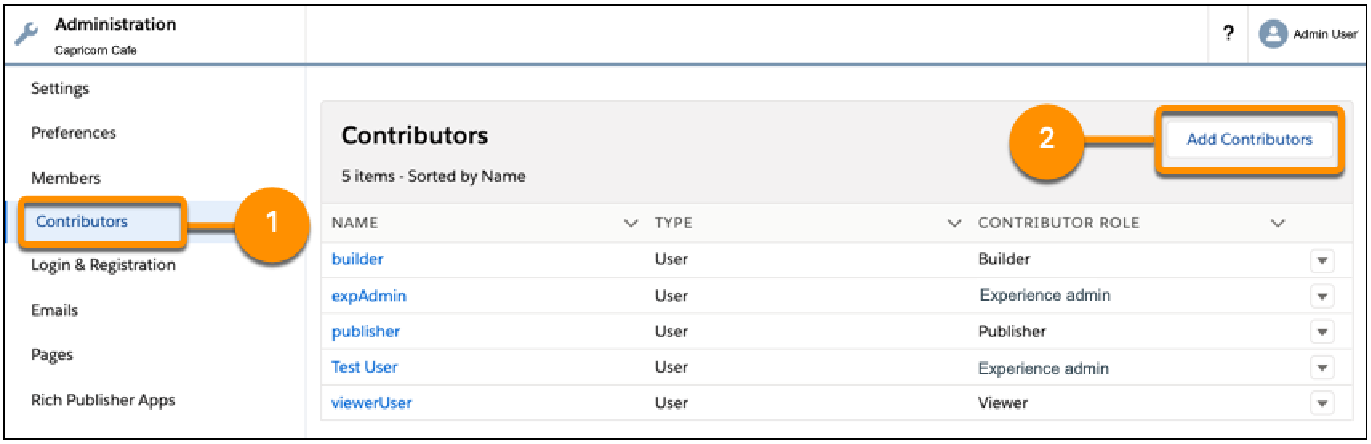
- Salesforce admin or Experience admin in that site

To be a contributor in an Experience Builder site:

- Create and Set Up Experiences is disabled

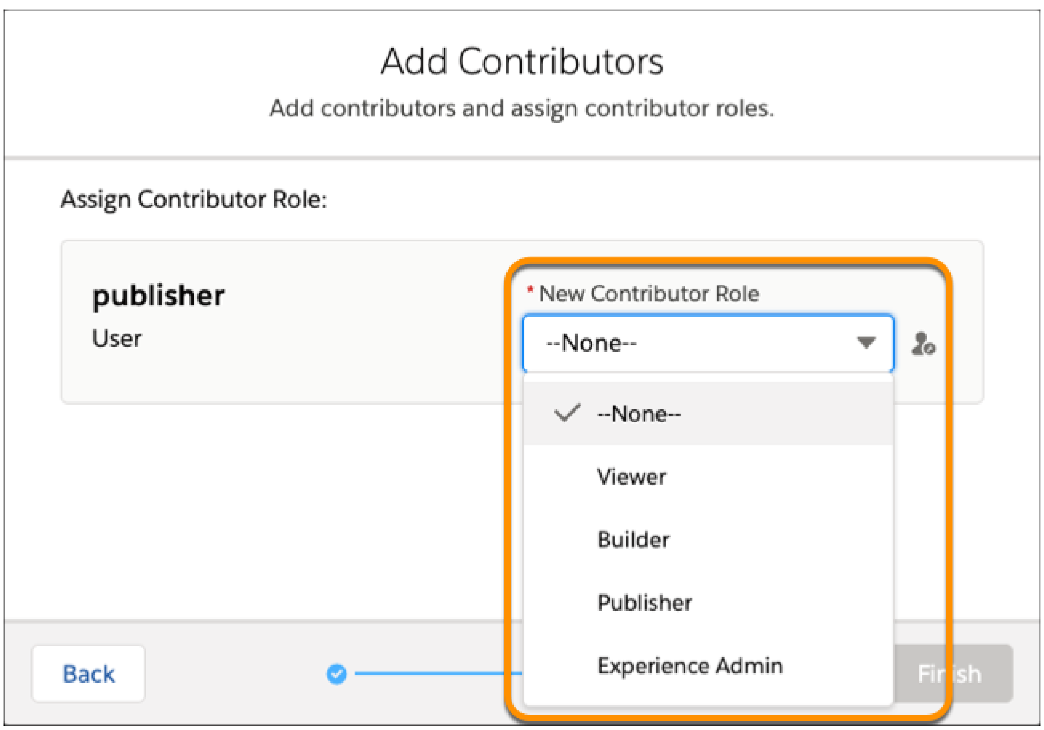
  AND

  Is a member of the site



Contributors in your Experience Workspace can curate Salesforce CMS content from within each site, and decide who sees it and how it appears. Make sure to use Full Copy sandboxes for CMS content and collections so that all of your content appears in the workspace.

3. Search for users. Only members of the Experience Builder site on page 57 are listed.
4. Click + next to the users you want to add.
5. Click **Next**.
6. For each user, assign a contributor role.



Experience admin

These contributors can do just about everything in an assigned Experience Builder site. They can access Experience Builder, can manage contributors, and publish the site.

Publisher

These contributors help you build and publish the assigned Experience Builder site. They can access Experience Builder and they can publish the site. They can't manage contributors. They have read-only access to the Experience Workspaces **Administration** > **Contributors** tab.

Builder

These contributors help build the assigned Experience Builder site. They can access Experience Builder. They can't publish the site or manage contributors. They have read-only access to the Experience Workspaces **Administration** > **Contributors** tab.

Viewer

These contributors have read-only access to Experience Builder in an assigned site. They can't publish the site or manage contributors. They have read-only access to the Experience Workspaces **Administration** > **Contributors** tab.

7. Click **Finish**.

Update a Contributor's Access Role

You can update a contributor's access role to increase or decrease the level of access. A contributor's access role is specific to an Experience Builder site, so you must change the contributor's role in each assigned site separately. Experience admins can't change their own role.

1. In your Experience Cloud site, go to Experience Workspaces, and select the **Administration** tile.
2. Select **Contributors**.
3. Click next to the contributor you want to update and select **Change Role**.

EDITIONS

Available in: Experience Builder sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Essentials, Performance, Unlimited, and Developer editions.

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

USER PERMISSIONS

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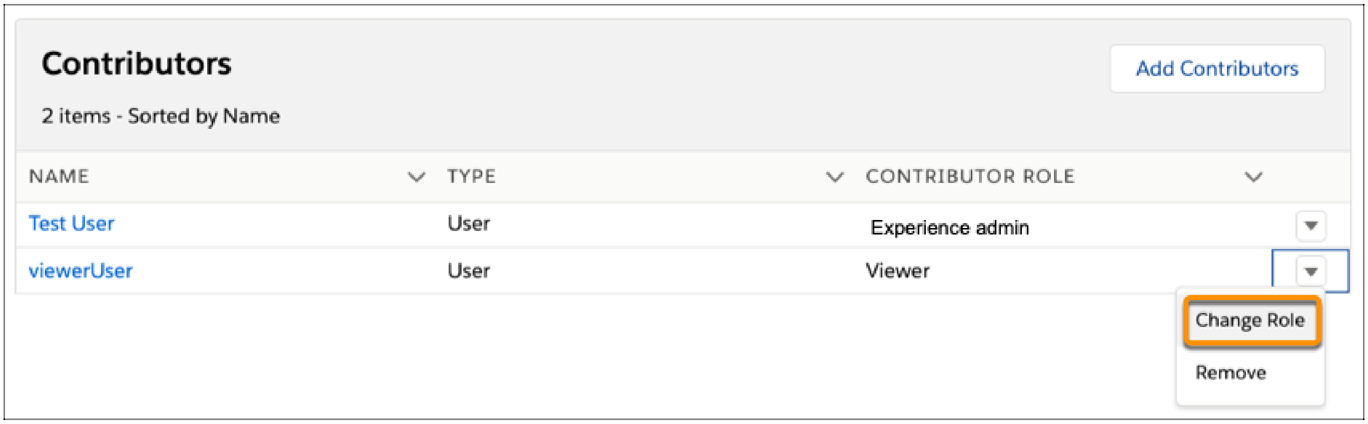
To be a contributor in an Experience Builder site:
- Create and Set Up Experience is disabled

  AND

  Is a member of the site



Note: To prevent you from accidentally removing your access to a site, you can't edit or remove your own contributor role. To change your level of access, another admin must update your role.

4. Select the new contributor role, and click **Update**.

Remove a Contributor from an Experience Builder Site

If a contributor leaves your company or is transferred to a different team, you can remove the contributor from a site. The user is removed from the Experience Builder site but not from Salesforce.

1. In your site, go to Experience Workspaces, and select the **Administration** tile.
2. Click next to the contributor you want to update and select **Remove**.

EDITIONS

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

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  Is a member of the site

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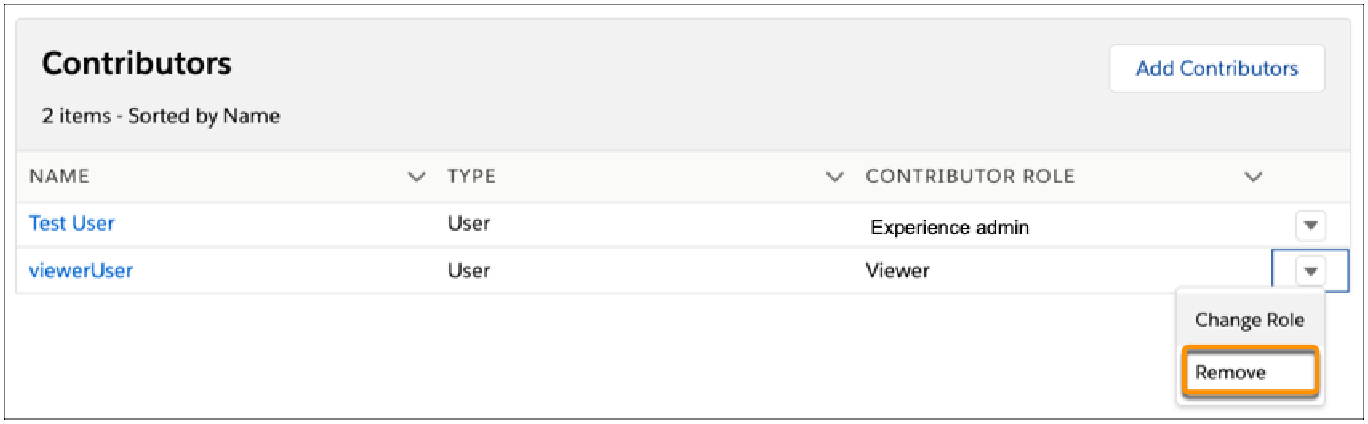
To be a contributor in an Experience Builder site

- Create and Set Up Experiences is disabled

  AND

  Is a member of the site



Note: To prevent you from accidentally removing your access to a site, you can’t edit or remove your own contributor role. To change your level of access, another admin must update your role.

After you remove a contributor from a site, the contributor can no longer access that site.

Add Style to Your Experience Builder Site with Themes

A theme is a collection of information that defines the visual flow of your Experience Builder site.

Themes are made up of layouts and styles, such as colors, fonts, and images. These elements combine to give you granular control of the appearance and structure of each page in your site. Themes are all about the look and feel of your site and are independent of your content.

Example: The default Customer Service theme includes two layouts.

- **Login**, which applies the theme layout to the login pages
- **Default**, which applies the theme layout to all non-login pages

Your site comes with several pre-built themes that you can quickly customize to meet your needs. Pre-built themes work across all our standard templates, such as Customer Service, Partner Central, Customer Account Portal, and Build Your Own (Aura). How you style an applied theme is unique to each site where the theme is used. The theme that you select changes the headers, footers, and other properties that are available for your site.

Note: Though pre-built themes come with their own layouts, you can switch between available layouts as needed. You can even work with your development team to create custom components and layouts.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To customize an Experience Cloud site:

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  OR

- Be a member of the site AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

IN THIS SECTION:

Prebuilt Experience Builder Themes

Prebuilt themes come with every template. They let you style your site with clicks, not code. Apply color, fonts, and images to your site to match your design or brand. Match your colors precisely by uploading your own logo to generate a custom color scheme. Create branding sets to change colors, fonts, and logos quickly for different audiences and needs.

Change the Theme of Your Experience Builder Site

Experiment and find the theme that works best for your needs, without changing your content.

Use Branding Sets in Experience Builder

Branding sets let you automatically change the look of your sites for different audiences and shift quickly between brands or presentations for campaigns or events.

Customize the Theme of Your Experience Builder Site

Customize the theme of your Experience Builder site by adjusting everything from the size and color of your headers and footers, to the fonts and colors for active text. We can get you started, but you get to make the final tweaks to make the theme your own.

SEE ALSO:

Developer Guide: Dynamic Branding with Login Pages

Prebuilt Experience Builder Themes

Prebuilt themes come with every template. They let you style your site with clicks, not code. Apply color, fonts, and images to your site to match your design or brand. Match your colors precisely by uploading your own logo to generate a custom color scheme. Create branding sets to change colors, fonts, and logos quickly for different audiences and needs.

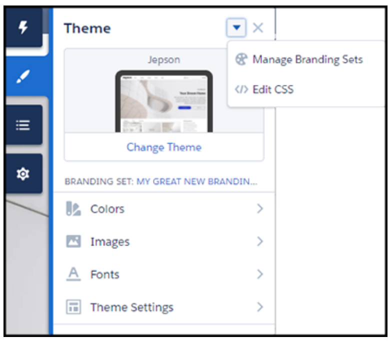
Pre-built themes give you a head start with your site that you can easily customize further. After you've created a site and selected your theme, use Experience Builder's Theme panel to adjust the experience.

This short video shows themes in action, Give Your Site Style with Pre-Built Themes.

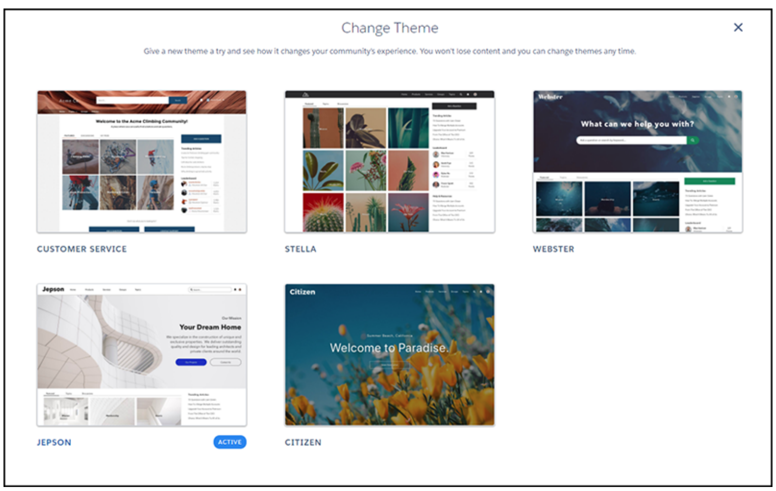
EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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



Click **Change Theme** to select a theme.



Depending on the theme you select, you can use Experience Builder for various tasks.

- Choose colors for text, actions, links, navigation, and borders.
- Specify font family, style, weight, and case, and add a custom font.
- Change header and page background color.
- Choose a custom Search component.
- Choose a custom User Profile component.
- Use custom CSS to apply your own styles.
- Generate a custom color scheme from an image of your logo or company pallet.
- Use a branding set to quickly target different audiences and needs.

Note: You can apply branding sets on an audience basis to change colors, images, and fonts. For information on targeting specific layouts or content to a specific group, see Personalization Using Audience Targeting in Experience Builder Sites.

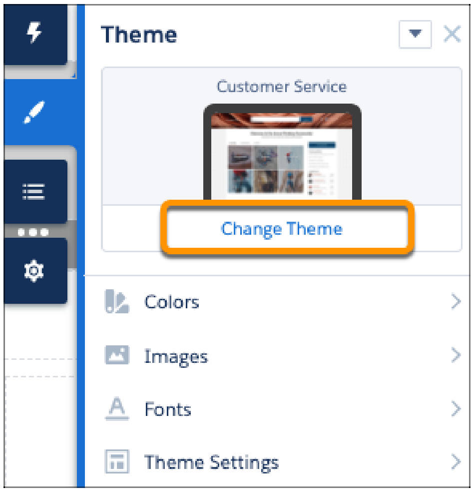
SEE ALSO:

Experience Builder Overview
Preview Your Experience Builder Site
Find and Create Asset Files in Experience Builder
Find and Create Asset Files in Experience Builder
Use Branding Sets in Experience Builder
Personalization Using Audience Targeting in Experience Builder Sites
Change the Theme of Your Experience Builder Site

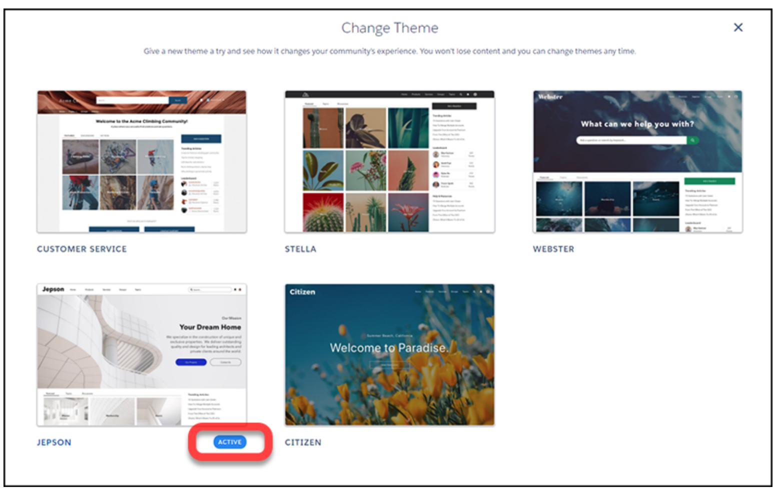
Change the Theme of Your Experience Builder Site

Experiment and find the theme that works best for your needs, without changing your content.

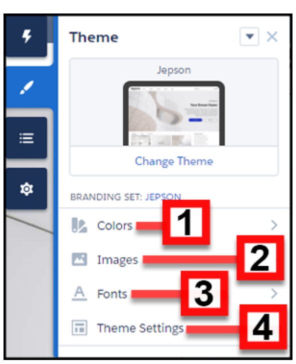
Changing themes is an easy, two-click effort in the **Theme** panel. Select **Change Theme** to see a list of available themes for your template.



Your current theme is flagged as **Active**. Select any other theme, activate it, and it's applied to your site.



Choosing a theme is just the start. Even if the defaults work for you, you're not stuck with them.



- Adjust the **Colors** (1) of text, backgrounds, and borders.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

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  OR

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To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

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- Be a member of the site AND an experience admin or publisher in that site

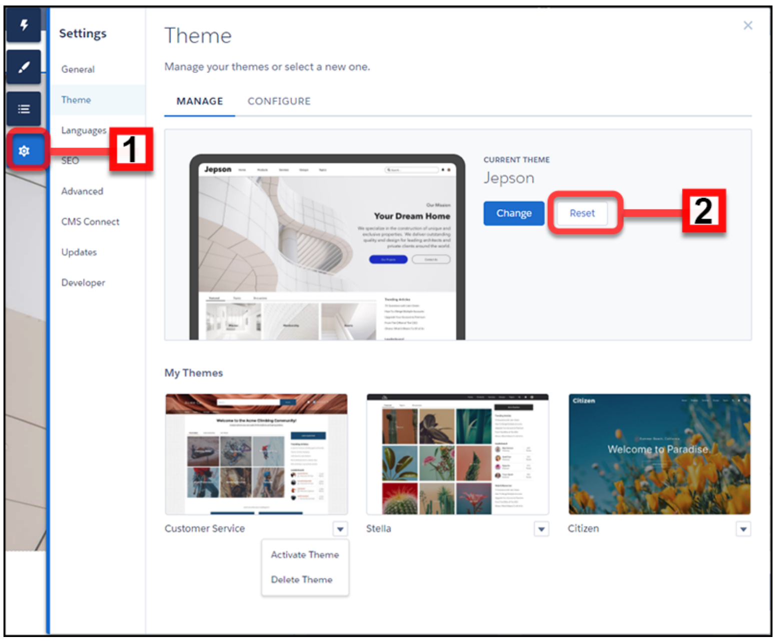
- Upload background **Images** (2) and your company logo.
- Select **Font** (3) styles.
- Adjust **Theme Settings** (4) that are specific to the active theme. For example, choose:
  - whether to show the hero
  - whether to keep the header from scrolling
  - the width of page content

    Note: Available settings are unique to the active theme.

- Add, modify, and adjust components on the page individually to complete the experience.

We remember the customizations that you create for your theme, even if you switch from the theme and then reactivate it later.

What if you don't like what you've customized? Easy, start fresh!



1. In Experience Builder Settings (1), select **Theme**.
2. Click **Reset** (2) for your current theme.
3. Read the warning and then click **Reset** to confirm.
4. Alternatively, you can reset a theme back to its defaults the next time you reactivate it in the Change Theme panel by selecting **Replace and start fresh**.

Note: Using either **Reset** or **Replace and start fresh** deletes all of your customizations.

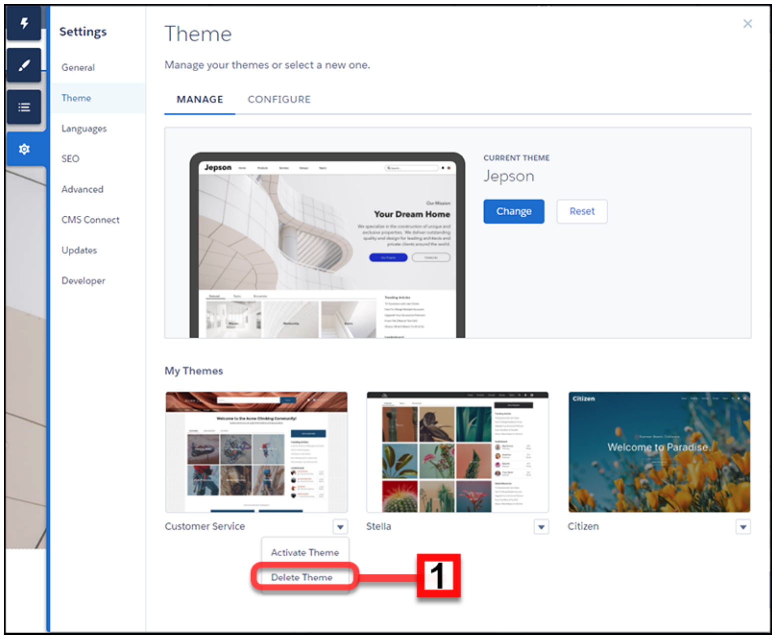
- Branding sets
- Theme regions (settings for common elements across pages like headers)
- Theme settings
- Custom theme layouts
- Custom theme layout assignments for pages
- Custom CSS overrides

These settings aren't retrievable, so be careful about selecting either **Reset** or **Replace and start fresh**.

Many pre-built themes have multiple layouts, such as home, login, and content pages.

Changing themes preserves your content, but a new theme doesn't necessarily display your content in a useful or desirable manner. After a change, always reconfirm that your site still works the way you want it to.

The Manage section of the Theme panel shows your currently active and configured themes.



Chances are you aren't using all of your themes, so you can delete (1) any extras here. Deleting a theme removes all of your customizations, similar to Reset. But you can add a fresh copy of the theme from the Change Theme section of the Theme panel.

SEE ALSO:

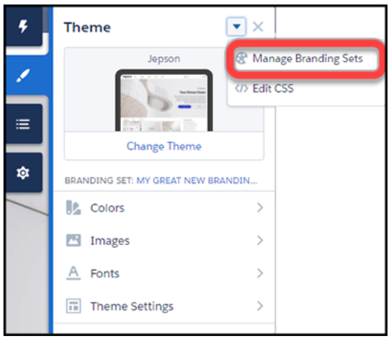
Custom Theme Layouts and Theme Layout Components

Customize the Theme of Your Experience Builder Site

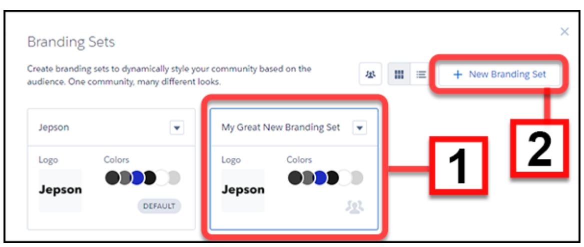
Use Branding Sets in Experience Builder

Branding sets let you automatically change the look of your sites for different audiences and shift quickly between brands or presentations for campaigns or events.

Branding Sets are bundled collections of images, fonts, and colors that can dramatically and dynamically change the look and feel of your site. You manage branding sets in the Experience Builder's Theme panel. If you're using a pre-built theme, the branding set doesn't affect the header and hero areas of your site.



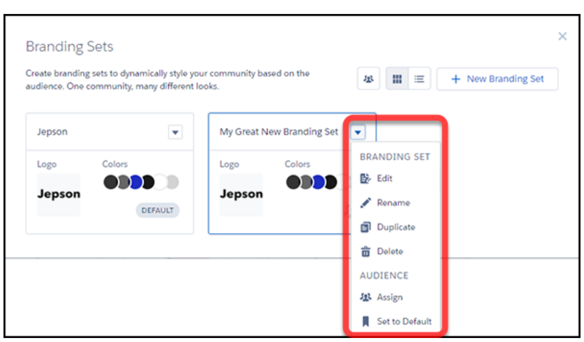
Note: Branding sets apply only to colors, images, and fonts. For more information on targeting layout or content to a specific group, see Personalization Using Audience Targeting in Experience Builder Sites.



You can maintain and manage several branding sets for any site. Each set (1) is a collection of colors and other elements that you can apply manually or programmatically, using Audiences. You can also start a new set from scratch (2).

Note: While you can create many automatic responses to audience, Dynamic Branding, such as declarations of Action Color, doesn't work with pre-built themes.

Manage each set, from its menu.



To create or edit a branding set, select it and the attributes you want to bundle.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

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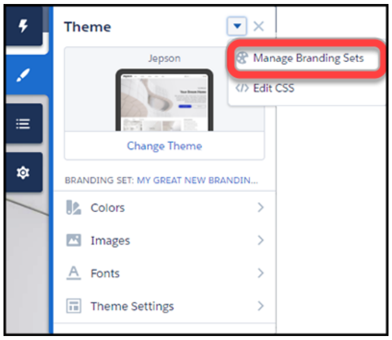
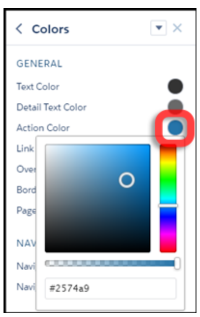
  OR

- Be a member of the site AND an experience admin or publisher in that site

1. Open the Theme panel and select **Manage Branding Sets**.



2. Choose the branding set to edit, or create one. All of your changes are associated with the selected branding set.
3. (Optional) Experience Builder can generate a color scheme for you when you select **Generate Palette from Image** in the Colors panel.
   a. In the Colors panel, click **Generate Palette from Image**
   b. Choose your previously uploaded company logo or a different image, like an image of your company palette. Experience Builder extracts the main colors from the image and generates a scheme.
   c. To modify colors, click the color swatch. To adjust the color, use the slider or enter hex values.

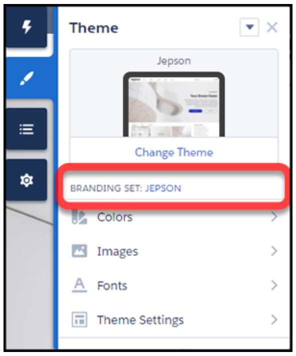


4. To set the attributes of your branding set, in the Theme panel, select or adjust the fonts, images, and colors.
   Your changes are saved automatically and appear instantly on the page. To review the results, select various page types from the Pages menu.

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

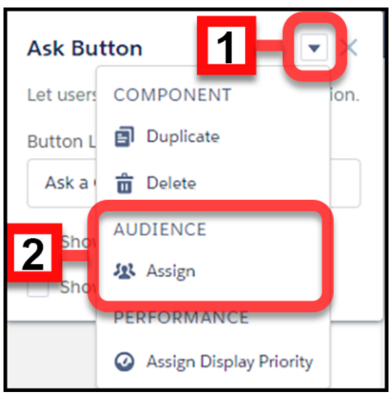
   When you add an image to your site for the first time, an asset file is automatically created and stored in the Org Asset Library.

You can always tell which branding set is active by looking at the Theme panel.



Remember that branding sets apply only to colors, images, and fonts. For more information on targeting layout or content to a specific group, see Personalization Using Audience Targeting in Experience Builder Sites

Note: Not all components in pre-built themes support audience targeting. You can confirm if a component can be targeted by looking in its component properties panel menu (1) for the Audience (2) section. If the section is missing or if there isn't a menu on the component properties panel, then the component doesn't support audience targeting.



If you can't find a way to control aspects of your site through the Theme panel or component properties, you can create your own CSS overrides. Your overrides apply to, and are remembered for, the currently active theme. Click > **Edit CSS** on the Theme panel to use your own CSS styles. Use CSS sparingly, and only when necessary, in case future releases of template components don't support all CSS customizations.

SEE ALSO:

Personalization Using Audience Targeting in Experience Builder Sites

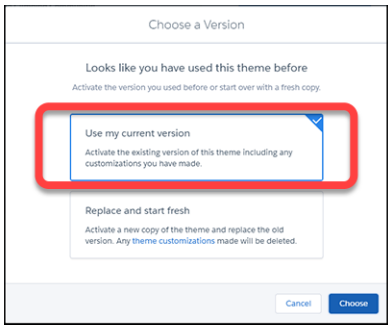
Developer Guide: Dynamic Branding with Login Pages

Customize the Theme of Your Experience Builder Site

Customize the theme of your Experience Builder site by adjusting everything from the size and color of your headers and footers, to the fonts and colors for active text. We can get you started, but you get to make the final tweaks to make the theme your own.

Every pre-built theme is loaded with options to help you achieve the style you want without ever dealing with code. And we remember how you set up each theme so you can change between them easily.

If you previously customized a pre-built theme, when you reactivate it you can decide to use your current settings or replace them and start over.



Note: Using either **Reset** or **Replace and start fresh** deletes all of your customizations.

- Branding sets
- Theme regions (settings for common elements across pages like headers)
- Theme settings
- Custom theme layouts
- Custom theme layout assignments for pages
- Custom CSS overrides

These settings aren't retrievable, so be careful about selecting either **Reset** or **Replace and start fresh**.

Changing themes preserves your content, but a new theme doesn't necessarily display your content in a useful or desirable manner. After a change, always reconfirm that your site still works the way you want it to.

EDITIONS

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IN THIS SECTION:

Custom Theme Layouts and Theme Layout Components

Theme layouts and theme layout components combine to give you granular control of the appearance and structure of each page in your site. Customize the layout's header and footer to match your company's style. Configure theme layout properties. Or use a custom search bar and user profile menu. Then use theme layouts to assign theme layout components to individual pages allowing you to quickly change layouts from one central location. Whether you're a consulting partner or an ISV, or you simply want to revamp your own site, custom theme layouts make it easy to rebrand.

SEE ALSO:

Developer Guide: Build a Condensed Theme Layout Component

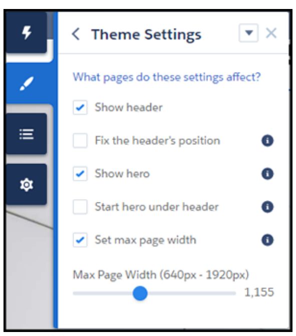
Trailhead: Create a Custom Theme Layout Component

Adjust the Style and Layout of Your Site Theme

Experience Builder sites include several pre-built themes that you can modify easily. In addition to customizing the layouts, you can configure colors, fonts, images, sizes, and actions with a ton of choices and levers.

You may be asking yourself: All those controls, where do I start?

Start with the broadest settings. The **Theme Settings** section of the Theme panel contains general settings that affect your entire theme. These settings vary depending on your site's active theme.



Setting	Description
Show header	Shows or hides the header.
Fix the header's position	Pins the header to the top of the scrolling area so that it remains visible while a customer is scrolling a long page. To see this working, publish and preview your site. The change doesn't appear in Experience Builder.
Show hero	Shows or hides the theme's hero image.
Start hero under header	Positions the hero image at the top of page, under the header, to provide a seamless look.
Set max page width	Sets the maximum width of the content across the page. Similar settings are in several component panels. The maximum width can be narrower than the overall display size of the header or hero.

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To create different layouts for different pages, in Experience Builder, go to **Settings** > **Theme** > **Configure**.

Each component type has different attributes that you can adjust in their property panels. Select a component to open its property panel and configure its options. Play with the settings to see what effects you can achieve. Changing your layouts doesn't affect your content directly, only how it's displayed. If you end up with something you don't like or can't use, and forget how to undo it, you can start over.

1. In Experience Builder Settings (1), select **Theme**.
2. Click **Reset** (2) for your current theme.
3. Read the warning and then click **Reset** to confirm.
4. Alternatively, you can reset a theme back to its defaults the next time you reactivate it in the Change Theme panel by selecting **Replace and start fresh**.

Note: Using either **Reset** or **Replace and start fresh** deletes all of your customizations.

- Branding sets
- Theme regions (settings for common elements across pages like headers)
- Theme settings
- Custom theme layouts
- Custom theme layout assignments for pages
- Custom CSS overrides

These settings aren't retrievable, so be careful about selecting either **Reset** or **Replace and start fresh**.

Theme Guidance: Header Components

Headers provide context and easy navigation throughout a site.

One header, lots of controls

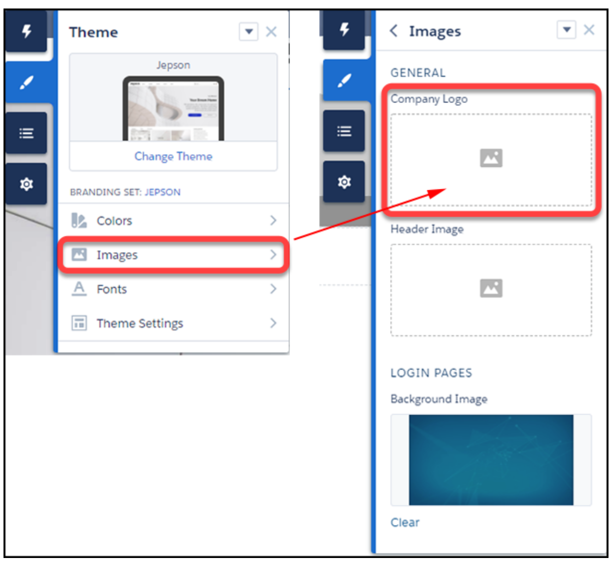
Headers have many options and controls for changing the look and feel of a page. Options and controls include the height, color, transparency, and even whether it stays fixed to the top of the screen while customers scroll. Combining adjustments to your header with adjustments to your hero section, if you use it, offers usability, variation, and visual interest. Explore the components property panel for your header and **Theme Settings** in your heme panel.

Different headers for different types of pages in the same site

It's common to have a different layout for your login page. Many pre-built themes have different options for the login, home, and other pages. A change to the header on the home page, for instance, isn't necessarily reflected on your content or login pages. If you employ different theme layouts, configure the changes for each variation separately, as you did in previous releases.

Changing the logo

If you already set a logo for your site, it's recognized and used by pre-built themes. If you haven't set a logo in the past or want to update your current choice, use the Images area of the Theme panel.



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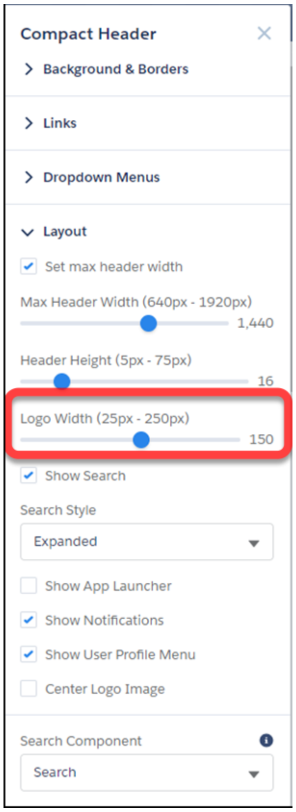
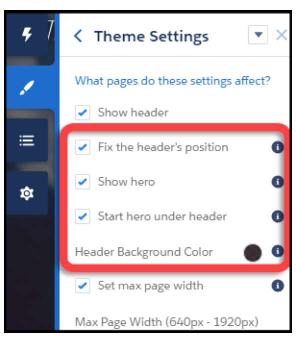
Branding sets let you apply different logos to different variations of your site or for different audiences and occasions.

Note: We try to resize your logo to fit the header. But you can adjust the size manually in the header component properties panel, using **Logo Width** in the Layout section. Your logo proportionally resizes relative to the width selected.



Header and hero interaction

- When "Fix the header's position" and "Start hero under header" are both enabled in **Theme Settings**, choose a background color for best visibility. If you leave the background transparent, menu items can become invisible when a customer scrolls down the page. Menu items can be hidden because the hero image has scrolled out of view. A solid background color avoids this problem.



Audience targeting

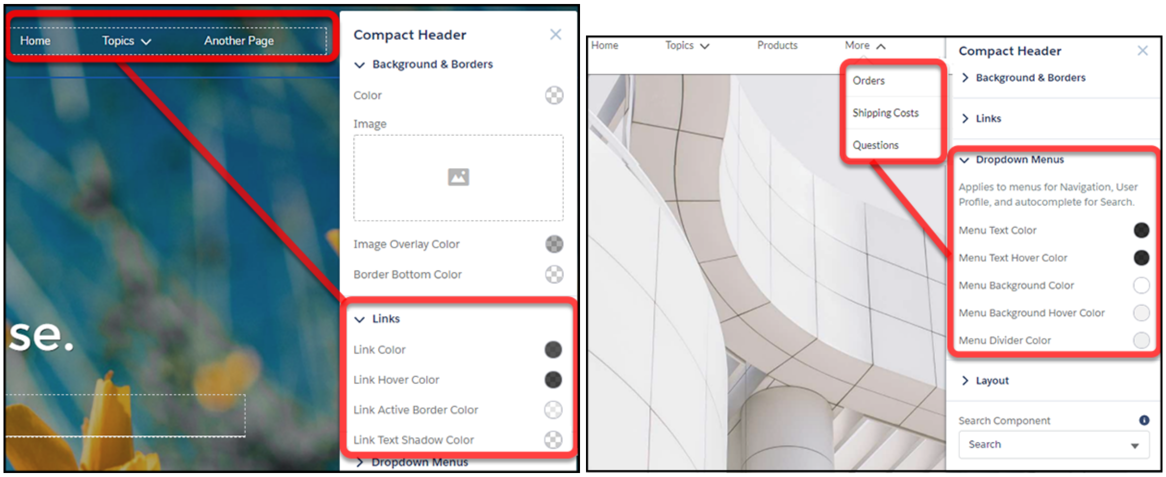
The new theme components (for example, Compact Header) don't currently support component-level targeting (visibility). However, with a little effort, it's still possible to set up targeting.

1. Create a custom theme layout in Experience Builder **Settings** > **Theme** > **Configure**.
2. Create a page variation.
3. Assign the new theme layout to your page variation (via Page Properties).

Finding the right controls.

With so many options, it can be easy to miss which control affects which part of your header.

Menu text color formats the options that appear on dropdown menus, like profile menus, navigation menus, and search deflection. Link color formats link text and icons that are visible in the header.



Mobile display

Specific aspects of the theme component properties, such as header height, are hard-coded for mobile devices using the Salesforce Lightning Design $mq-small media-query. The setting results in a maximum width of 47.9375 em.

Theme Guidance: Hero Component

Hero images are large images that are designed to dominate the visual field of a page and grab attention.

Hero layouts are all about visual impact. The *hero* is an image that dominates your page, providing a sense of theme, style, and purpose. But while hero layouts are excellent for setting mood and style, they eat up space. So they're not good for a page that needs a lot of functionality.

A search versus a call to action focus

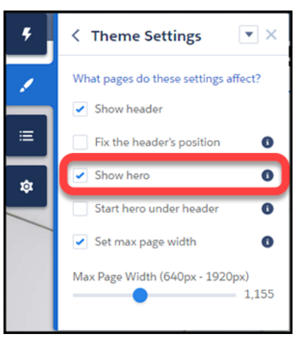
Pre-built themes come in two different flavors that focus on different needs: hero search and hero call to action.

- Uses for hero search
  - Sites that serve as an entry to a lot of diverse information with no easy way to provide a top-level organization.
  - Sites where it's challenging to predict customer needs or where your customers' information needs vary widely.
- Uses for hero call to action
  - Sites with a focused purpose, like fund-raising or a supporting a specific event.

Selecting and swapping hero components

The Webster, Jepson, and Citizen themes each come with a pre-configured hero theme component (Search or Call to Action). You can use these themes as they come or easily swap them through the component properties in Experience Builder.

Like the theme but don't want to use the hero style layout? Easy, uncheck **Show hero** on the **Theme Settings** tab of the Theme Panel.



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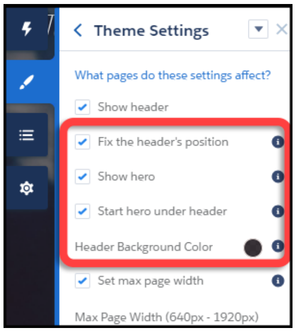
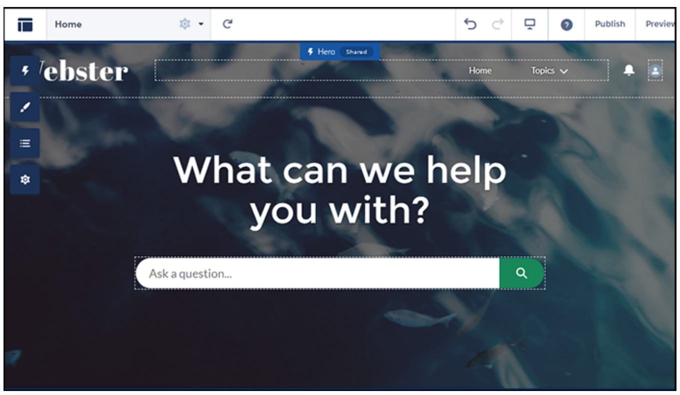


Theme Guidance: Search Component

Multiple search components and placement options give you flexibility to design the right experience for your customers.

Pre-built themes offer the flexibility to have a search-first approach. This approach encourages customers to enter questions first to find answers rather than navigate through menus and pages.



But you can also have search in your header. To avoid confusion and clutter, if you're using the hero with search turned on, deselect search to hide it in your header. Themes with heroes have secondary layouts for the non-Home pages. That's why search is on by default in the header of your other non-login pages.

Note: Remember that Login pages have their own specific layouts.

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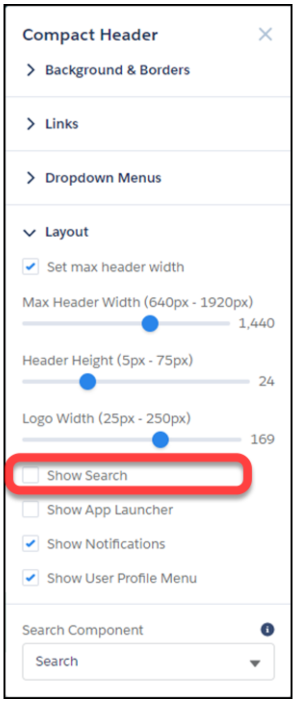
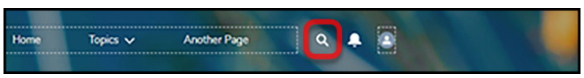


Selecting a search component that collapses and expands



When the search component is collapsed, you can't select it directly. Click the search icon to expand it, then select it to see its property editor. Alternatively, select **Search** in the page structure panel to bring up its property editor. Selecting Search in the page structure panel means you can't see any changes you're making. You can't see your changes because the search component isn't visible on the page.

Exporting a custom search component

Imagine that you're using a Lightning Bolt Solution to export a site with a pre-built theme. The theme uses the global search, peer-to-peer component, or a custom search component. Keep in mind that this solution doesn't include the custom search component. The search component isn't exported because the property value `commThemeSearch` isn't included in the Lightning Bolt Solution.

Custom Theme Layouts and Theme Layout Components

Theme layouts and theme layout components combine to give you granular control of the appearance and structure of each page in your site. Customize the layout's header and footer to match your company's style. Configure theme layout properties. Or use a custom search bar and user profile menu. Then use theme layouts to assign theme layout components to individual pages allowing you to quickly change layouts from one central location. Whether you're a consulting partner or an ISV, or you simply want to revamp your own site, custom theme layouts make it easy to rebrand.

A theme layout component is the top-level layout (1) for the template pages in your site. Theme layout components are organized and applied to your pages through theme layouts. A theme layout component includes the common header and footer (2), and often includes navigation, search, and the user profile menu. In contrast, the content layout (3) defines the content regions of your pages. The next image shows a two-column content layout.

A theme layout categorizes site pages that share a theme layout component. You can assign a theme layout component to any theme layout. Apply the theme layout in the page's properties.

> **Note:** To create custom theme layout components in the Developer Console, a developer implements the `forceCommunity:themeLayout` interface. All of our pre-built themes are developed on top of this interface and also use several design property interfaces (color picker, image picker, slider) in Experience Builder. Pre-built themes also take advantage of theme swapping. You can quickly change the overall look and feel of the site without impacting any of the underlying pages, page layouts, and components.

> **Example:** Let's say you create three pages for your upcoming Spring campaign. You want them to use the Large Header theme layout component that your developer created. In the **Settings** > **Theme** area, you add a custom theme layout called Spring to categorize these pages and assign the Large Header layout component to it.

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USER PERMISSIONS

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- Create and Set Up Experiences AND View Setup and Configuration

To customize an Experience Cloud site:
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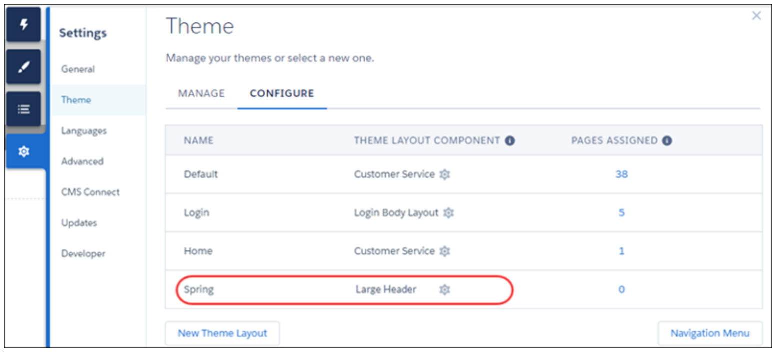
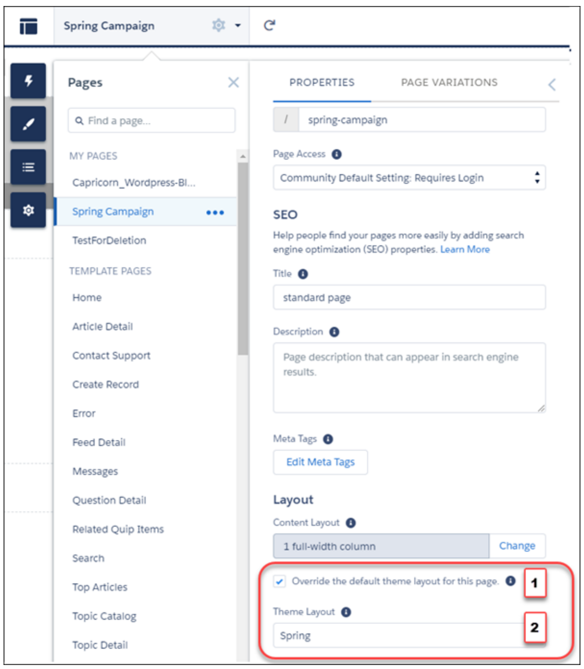
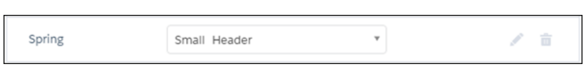


Next, apply the Spring theme layout in each page's properties, which instantly applies the Large Header layout to each page.



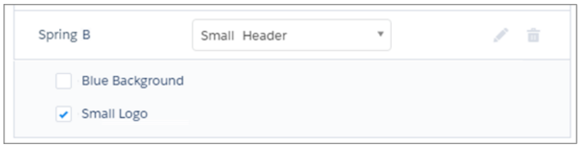
To apply the theme layout, select **Override the default theme layout for this page** (1). This selection shows the **Theme Layout** options. Then, choose the new layout (2) from the available choices.

Everything looks rosy until your VP of marketing decides that the header takes up too much room. That's an easy fix because you don't have to update the properties of each page to change the theme layout. Instead, with one click in the Theme panel, you can switch Spring to the Small Header layout component and instantly update all three pages!

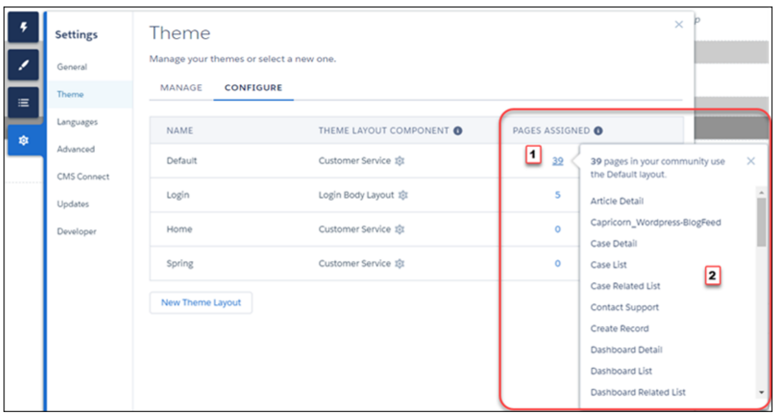


Example: Now let's say that the Small Header layout includes two custom properties—Blue Background and Small Logo. You enabled and applied these properties to all your campaign pages. However, for one page, you want to apply only the Small Logo property.

In this case, you could create a theme layout called Spring B, assign the Small Header layout component to it, and enable Small Logo. Then, you apply the Spring B theme to the page.



Not sure which pages are associated with any of your theme layouts?



With a click and a glance, you can see how many and which pages are associated with any of your theme layouts. From **Settings** > **Theme**, click the Pages Assigned total for any theme layout row (1). Clicking this value opens a list of the pages associated with that theme layout (2).

Theme layouts make it easy to reuse the same theme layout component in different ways while maintaining as much granular control as you need.

SEE ALSO:

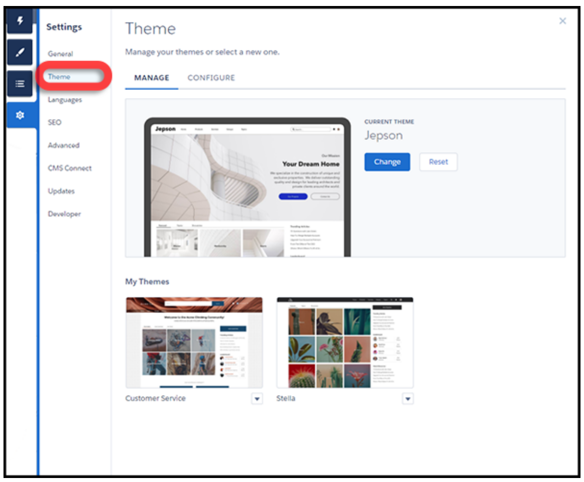
- Change the Theme Layout of Your Experience Cloud Site's Pages
- *Experience Cloud Developer Guide*: Create Custom Theme Layout Components for Experience Builder
- *Experience Cloud Developer Guide*: Configure Swappable Search and Profile Menu Components
- Developer Guide: Build a Condensed Theme Layout Component
- Trailhead: Create a Custom Theme Layout Component

Change the Theme Layout of Your Experience Cloud Site's Pages

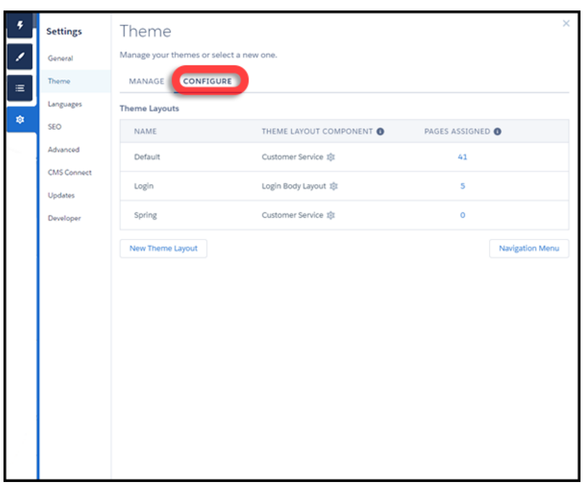
A theme layout defines the top-level regions of your page, such as the header and footer, navigation, search, and the user profile menu. A theme layout component categorizes the pages in your site that share a theme layout.

A developer creates custom theme layout components in the Developer Console by implementing the `forceCommunity:themeLayout` interface. The developer can also add properties to a custom theme layout, which you can configure in the Theme panel area in Experience Builder. When the custom layout component is available, assign it to a theme layout to instantly transform the pages that use that layout.

1. In Experience Builder, click  on the left sidebar and then click **Theme**.



2. To view and configure your theme layouts, select **Configure**.



3. If necessary, create a **New Theme Layout**.
4. Select a theme layout component for the theme layout.

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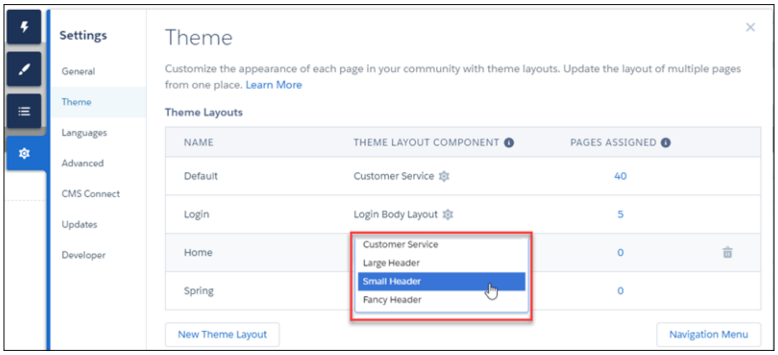
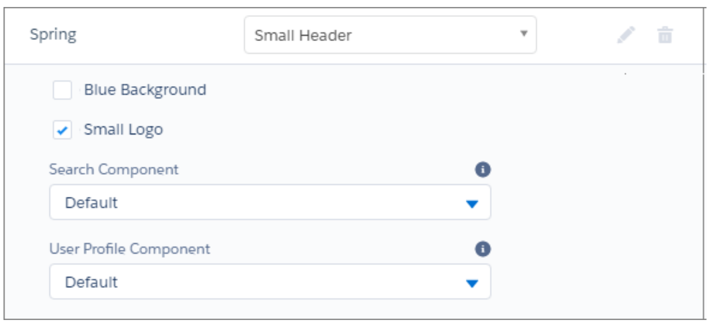


5. Update the theme layout's settings, if available—properties vary depending on how your developer configured the theme layout component.



For example, the Default layout component in the Customer Service theme includes the following options for the header region.

Hide the header region and navigation
Hides the default site header on all site pages. The default site header includes the header image, search box, site menu, and user profile navigation menu. Select this option to replace the default header with a custom header.

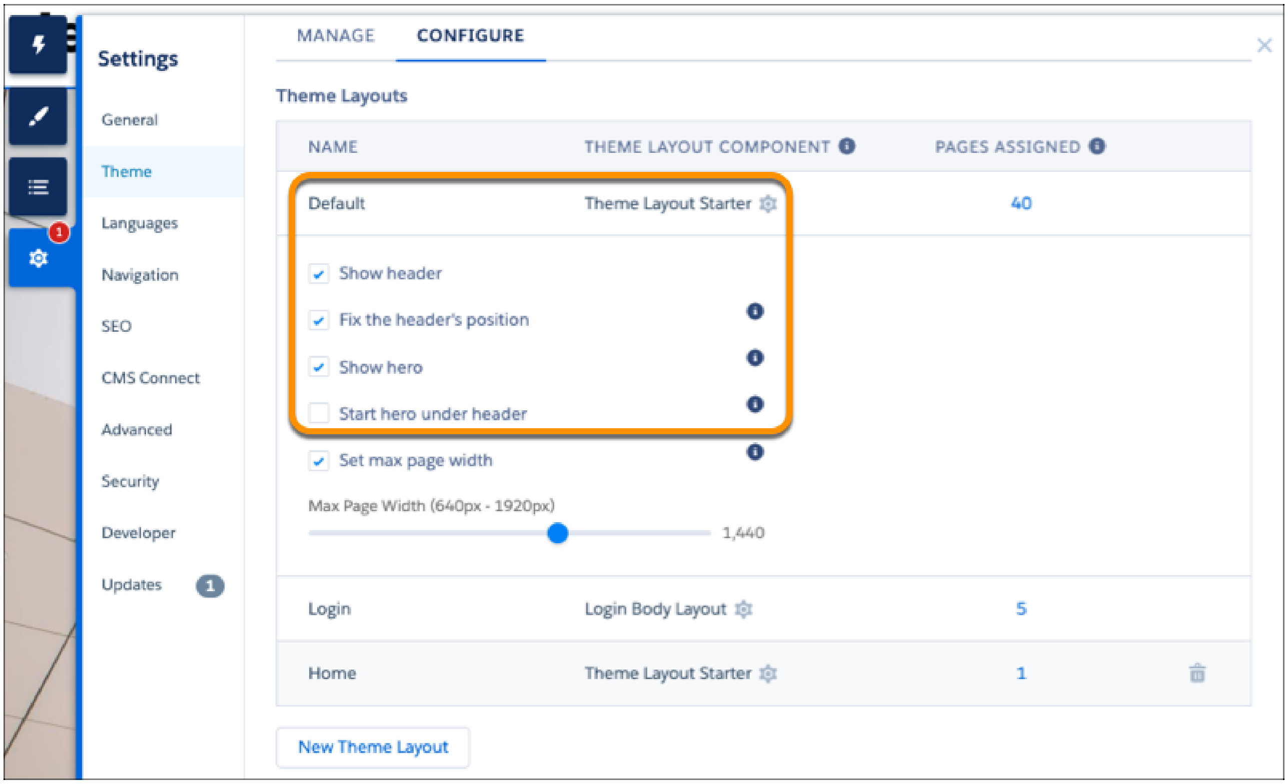
Hide notifications icon in site header
Hides the notifications icon. Useful when you have a custom header or don't use notifications.

Search Component
Replaces the default Search and Post component with a custom component, if available.

User Profile Component
Replaces the default Profile Header component with a custom version, if available.

Set max page width
Sets the maximum width of content across the page. The maximum width can be narrower than the overall display size of the header or footer.

However, the Default layout component for the Jepson theme has different options.



Show header

Displays or hides the header.

Fix the header's position

Pins the header to the top of the scrolling area so that it remains visible while a customer is scrolling down through a long page. To see this working, publish and preview your site. The change doesn't appear in Experience Builder.

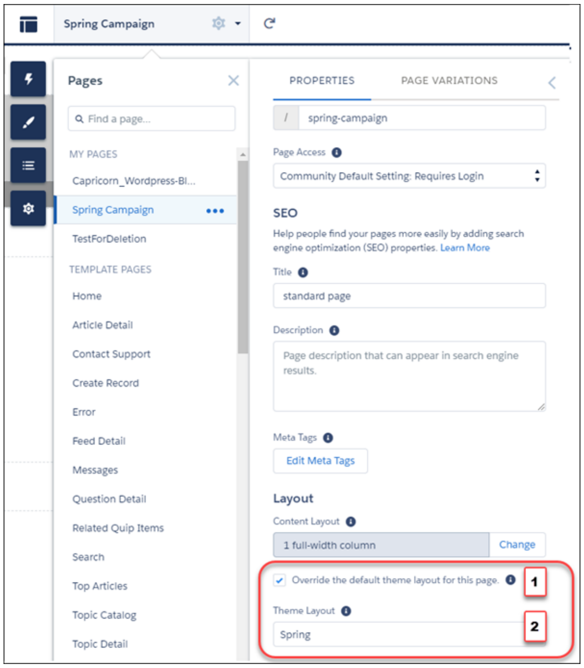
Show hero

Displays or hides the theme's hero image.

Start hero under header

Header visually overlaps the hero. We recommend using a transparent background for this header.

6. To apply the theme layout, select Override the default theme layout for this page (1). Selecting this option shows the Theme Layout options. Then, choose the new layout (2).



SEE ALSO:

Custom Theme Layouts and Theme Layout Components

Page Properties and Types in Experience Builder

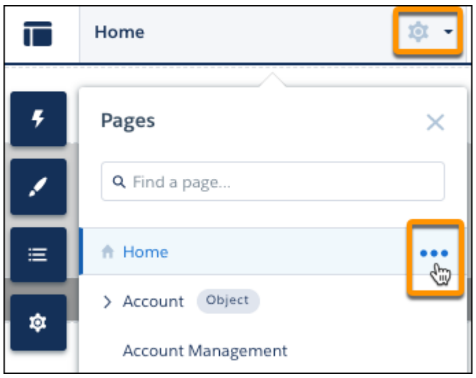
Experience Cloud Developer Guide: Create Custom Theme Layout Components for Experience Builder

Experience Cloud Developer Guide: Configure Swappable Search and Profile Menu Components

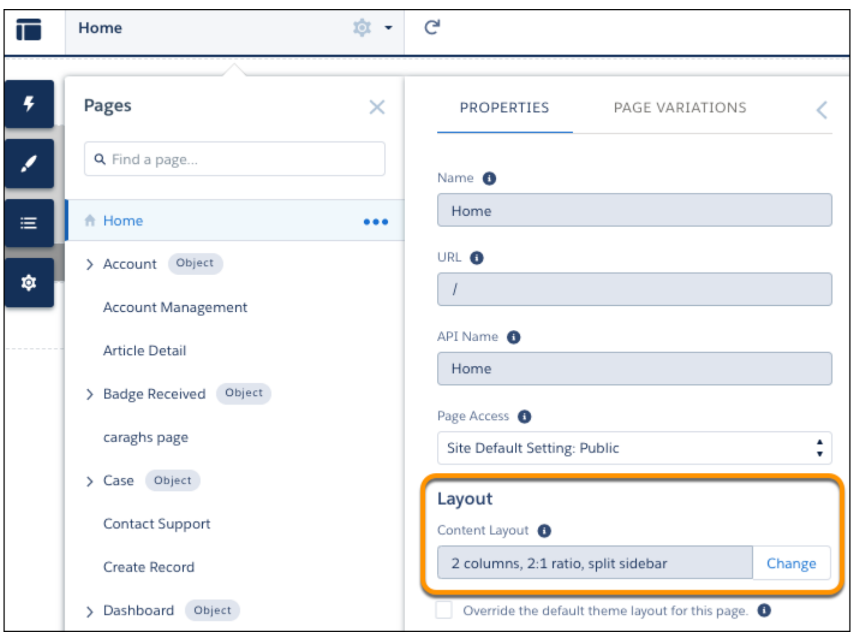
Change the Content Layout in Experience Builder

Quickly change the look of your Experience Builder site pages by switching to a different content layout. You can even create your own custom content layout components in the Developer Console and import them to use in your site.

1. In Experience Builder, open the page's properties. Click beside the page on the top toolbar, or click > **Page Settings** beside the page in the Pages dropdown menu.



2. In the Layout section of Page Properties, click **Change**.



If a page variation is available, you can make it the active page by selecting the page variation. You can then change its content layout as required.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

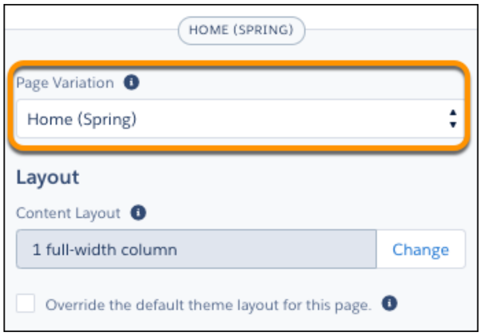
- Be a member of the site AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

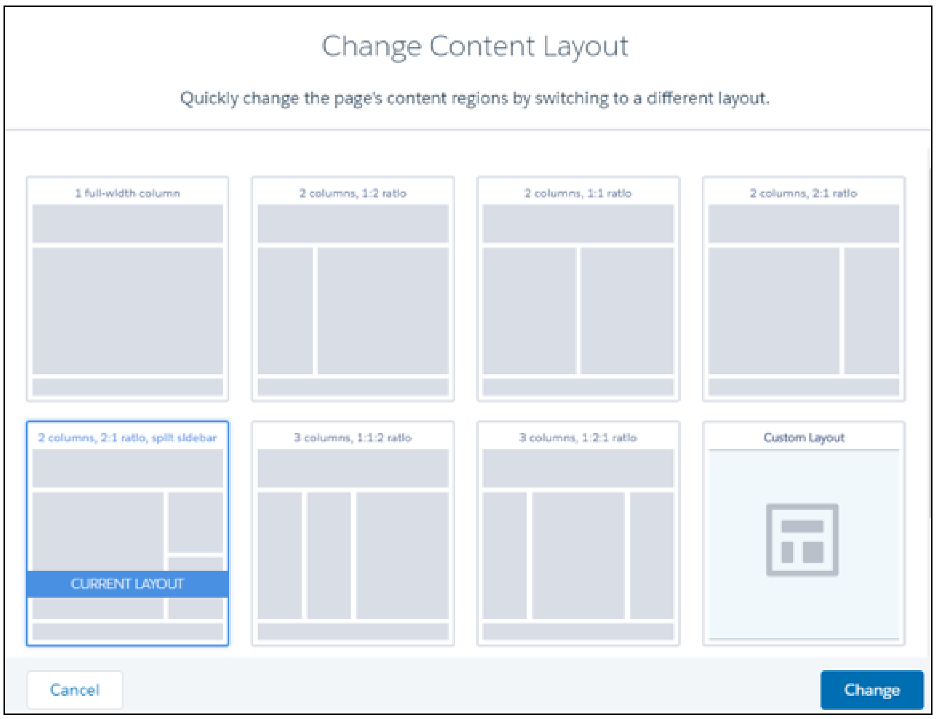
- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site



3. Select the new layout. If you created a custom content layout component, you see both ready-to-use and custom content layouts displayed together.



4. Click **Change**.
   If the structure of the new layout is different from the current layout, some regions aren't visible. However, the regions are still available and you can switch to a different layout at any time.

   Note: If you change the layout of a default template page, the only way to revert to the original layout is to click **Undo**.

SEE ALSO:

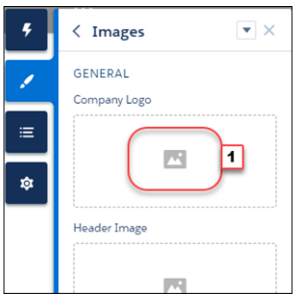
Experience Cloud Developer Guide: Create Custom Content Layout Components for Experience Builder

Find and Create Asset Files in Experience Builder

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

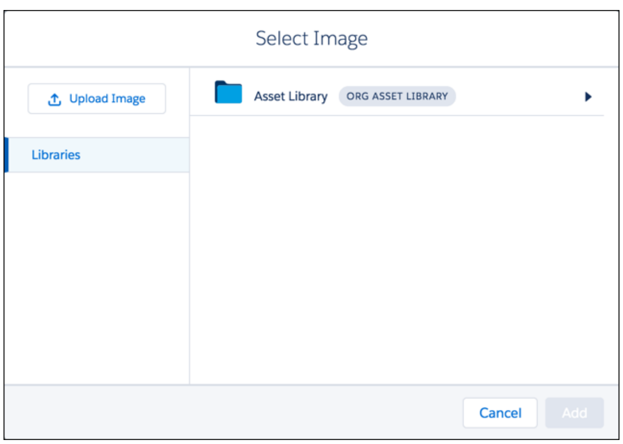
Note: Salesforce admins and community managers have access to the Asset Library by default. Standard users who are members of the Asset Library can edit and delete asset files they own. Only admins can edit and delete asset files they don't own. To allow standard users to upload content in Experience Builder, make sure they are members of the Asset Library.

1. From Experience Builder, open the Theme panel and select **Images**. Click an image icon (1) to open the unified file selector.



The file selector displays only image files, so you don't have to wade through all your files to find your logo or header image. If the image file you want is already an asset file, it's in the asset library, which is clearly marked by the Org Asset Library badge. Asset files for your Salesforce org and all your sites are stored in the Org Asset Library, so you don't need to maintain copies in different places.

2. Select an existing file or click Upload Image to add a new one.



When you add an image to your site for the first time, an asset file is automatically created and stored in the Org Asset Library. Admins have full access to the Org Asset Library and can search for, tag, and subscribe to asset files.

To provide library access to users, add them as members of the library with the appropriate permissions. Users without these permissions don't see the Org Asset Library. The Org Asset Library is available in all new orgs, and is automatically activated in existing orgs.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To create an Experience Cloud site:

- Create and Set Up Experiences AND View Setup and Configuration

To customize or publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences
- OR
- Be a member of the site AND an experience admin, publisher, or builder in that site

To edit or delete asset files or to add asset files to the Asset Library by default in Experience Builder or Salesforce CMS:

- Customize Application

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

SEE ALSO:

Asset Files

Experience Builder Settings

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

To access the Settings area in Experience Builder, click ⚙ on the left sidebar.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

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  OR

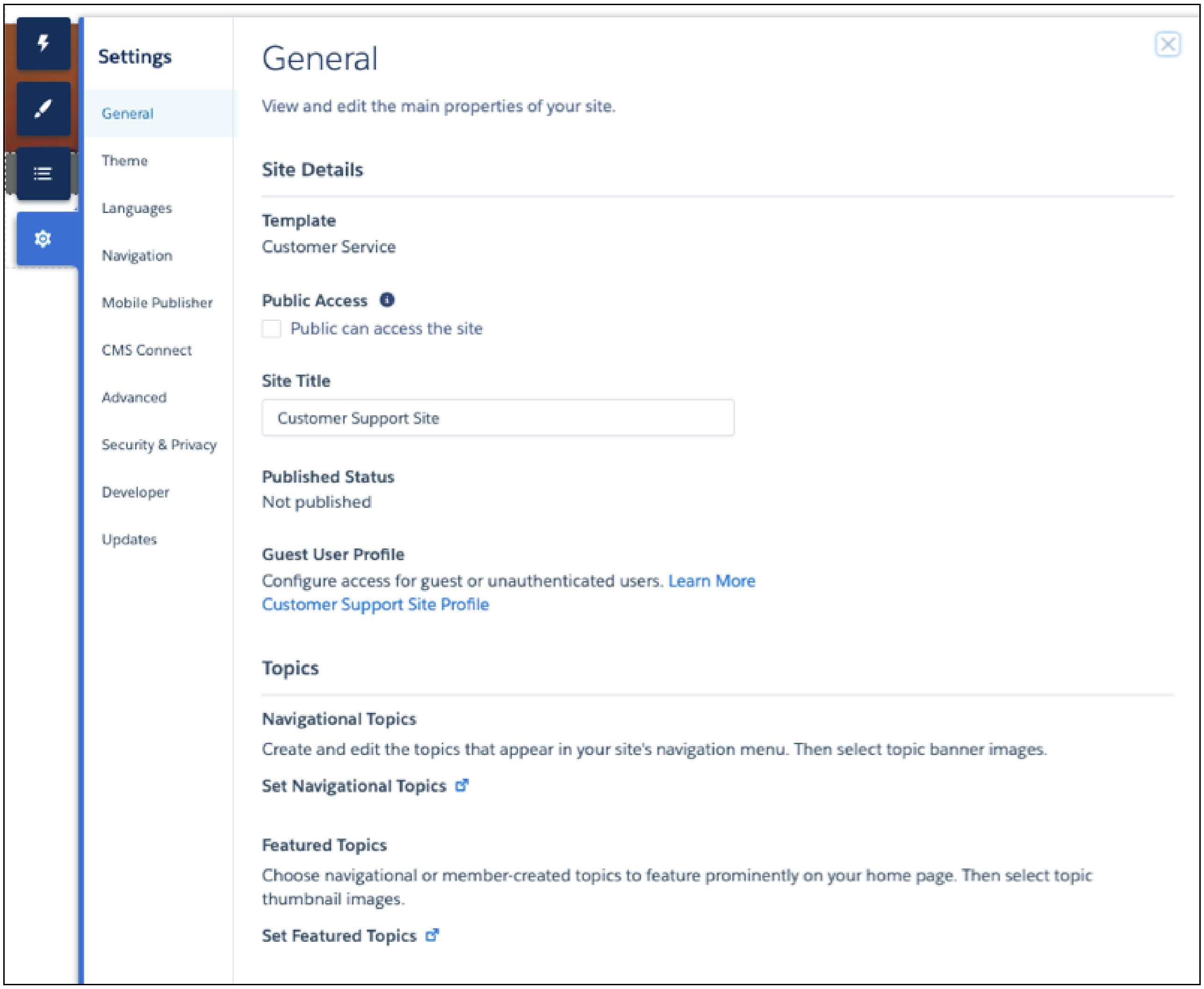
- Be a member of the site AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site



General

In the General area, settings include:

Template

Displays the name and version of the template that your site is using.

Public Access

Specifies the level of access to the page. When you enable public access, guest users can view asset files on public pages by default. Users whose profile settings are more restrictive may not be able to view this page, even if you choose Public.

When you enable public access, the preference **Let guest users view asset files on public pages** in **Administration** > **Preferences** is automatically enabled.

Site Title

Lets you set the title for your site. The title briefly appears in the browser's title bar before your site's Home page loads.

Published Status

Indicates whether your site is published. If it's published, click the link to open the live site in a separate browser tab.

Preferred Domain

Lets you choose which domain to use for indexing your site's pages to improve search engine results. (Multiple domains for the same site can dilute search engine results and lower page ranking.) The Preferred Domain dropdown appears only after you set up domains and custom URLs for your site in Setup. You can set only HTTPS preferred domains.

Guest User Profile

Displays the associated guest user profile. Clicking the link takes you to the Profile page in Salesforce Setup, where you can modify profile settings, such as which permissions the guest user has. For more information about configuring the guest user profile, see Give Secure Access to Unauthenticated Users with the Guest User Profile.

Set Featured and Navigational Topics *(Customer Service template only)*

Define featured topics and topics to be used for navigation in Experience Workspaces or Experience Management.

Theme

In the Theme area, you can control the layout and appearance of each page in your site.

Languages

In the Languages area, set the multilingual properties for your site. When set, these properties are used by the Language Selector component, which lets guest users select their preferred language on a page in your site.

Navigation

In the navigation area, create and manage navigational menus for your site. Menus can be used in Navigation, Tile Menu, Profile, and custom menu components.

SEO

In the SEO area, you can define what information can be indexed by external services and discovered through online searches. From the Guest User Profile, make an object's records public and available for SEO indexing. You can also generate a manual sitemap refreshfor your site.

Note: To access SEO settings in Experience Builder, enable public access for your site from the General area in Settings.

CMS Connect

Add a header and footer from a connected CMS source to your site.

Advanced

In the Advanced area, you can track page views, mask IP addresses, add markup to the page head, and show all components in the Components panel.

By default, we filter the components available in the Components panel according to each page's purpose. For example, the Case Comments Publisher is available only for the Case Details page. When you enable **Show all components**, you see the complete list of components when you open the Components panel for any page (except login pages). However, you can still only add the Related Questions List component to the Question Detail page and the Related Articles List component to the Article Detail page.

Important: Some components require the page to pass specific parameters. When you remove component filtering, you can add a component that relies on a passed parameter to a page that doesn't pass any values. For the component to work correctly, you must manually configure the component's parameters.

For example, some components that take `{!recordId}` as a parameter expect to get this value from the page's URL. If you add the component to a page that doesn't pass this value through the URL, you must manually provide it.

Similarly, let's say you add the Group Detail component, which requires a `{!recordId}` value, to the Case Detail page instead of the Group Detail page. Although both pages pass a `{!recordId}` value, the ID that Case Detail passes is incorrect.

Security & Privacy

Manage security and privacy settings for your Experience Cloud site, including Clickjack protection, Content Security Policy (CSP), and site cookie usage.

Updates

In the Updates area, you can update your site's template to the latest version.

Developer

In the Developer area, you can export customized Experience Builder templates and pages. You can add these templates and pages to a Lightning Bolt Solution to distribute to other orgs or publish on AppExchange.

Update Your Experience Builder Site's Template

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To update your template

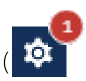
- Create and Set Up Experiences AND Manage Experiences

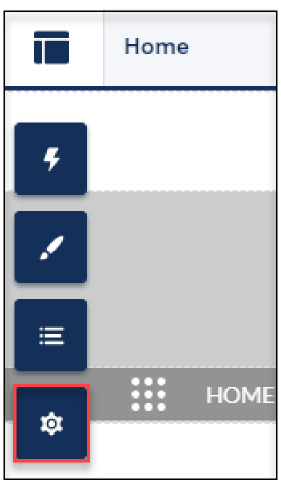
We introduce amazing features and enhancements with every release, so it pays to keep your Experience Builder site up to date! Typically, we automatically update your template to the latest version, so you can start adding the newest features to your site right away. However, when the changes are significant, you're required to update your template manually.

Note: All template improvements are made on the latest version. Avoid missing out by keeping your template current.

The Koa and Kokua templates are in a phased retirement. From Summer '17, you can no longer use them to create sites. We therefore recommend working with Salesforce Support to replace your existing Koa and Kokua sites. Take advantage of the latest templates, which provide richer support for Knowledge and case management, along with a slew of other new features.

We no longer support Koa, Kokua, and Customer Service template versions from before Winter '16 (October 2015).

The impact of updating a template depends on the version your site is using. When a manual template update is available, a red notification icon () appears over the Settings icon.



Important: **We strongly recommend that you test the impact of the update in a sandbox environment. After you update and publish your site, you can't revert to an older version.**

My Current Template Type and Version	What Can I Expect When Updating to Spring '19?
Winter '19 templates and Lightning Bolt solutions	• Accessibility and performance improvements on the following components:

My Current Template Type and Version	What Can I Expect When Updating to Spring '19?
	– Navigation Menu – Reputation Leaderboard – Related Records – Trending Articles by Topics If you've applied CSS customizations, migrate them in the upgraded components. Note: Overriding CSS isn't recommended. The best way to update the styling of your components is to use the Theme panel in Experience Builder. To update existing CSS overrides see CSS mappings for updated components.
Summer '18 templates and Lightning Bolt solutions	Your site is updated automatically with all the features of the Winter '19 release. No need to manually update.
Spring '18 templates and Lightning Bolt solutions	• Improvements to tooltip positioning by changing several panels, dialogs, and tooltips to use a shared container • Updates to the Language Selector's functionality and appearance (current preferences are maintained) • Improvements to the property editor container • All the changes that apply to subsequent updates • If you've applied CSS customizations, migrate them to the upgraded components Note: Overriding CSS isn't recommended. To update existing CSS overrides, see CSS mappings for updated components and Standard Design Tokens for Sites.
Winter '18 templates and Lightning Bolt solutions	• A dropdown menu to set audiences at the component level • Out-of-the-box UI enhancements, such as font sizing • Upgraded Reputation Leaderboard, Trending Articles by Topic, and Related Articles. If you've applied CSS customizations, migrate them to the upgraded components. Note: Overriding CSS isn't recommended. The best way to update the styling of your components is to use the Theme panel in Experience Builder. To update existing CSS overrides see CSS mappings for updated components. • A new User Profile Menu component that automatically replaces the Profile Header component in updated templates • The base component on the Record Detail page for custom objects is replaced with a newer version for desktop view mode. If you currently have CSS overrides for record layout, keep them, and refer to *CSS Overrides Migration for the Record Layout Component* to add your styles and customizations to the new component • A new Theme panel that redesigns the Branding Panel in Experience Builder. • Additions to Theme settings that help you easily see which pages a theme layout is associated with • More metadata options to improve discoverability of pages through SEO

<table>
<tr><th>My Current Template Type and Version</th><th>What Can I Expect When Updating to Spring ’19?</th></tr>
<tr><td></td><td>

Query parameters in a site URL, other than language, no longer persist while navigating within a site
Updates to CMS Connect (JSON) require manual updating to connections created with the Winter ’18 release.

CMS Connect (JSON) now autocreates detail pages. URL’s using query parameters pointing to your manually created pages will continue to work. However, they will not be accessible from the CMS Connect (JSON) Property Editor in Experience Builder.

Note: For better SEO and management, it is best to use the new, automatically created pages.

In Experience Workspaces, add a Content Type and the JSON path for both ID and Title.
In Experience Builder, open the Property Editor of the existing CMS Connect (JSON) component by selecting it.
Click Save to create and autoconfigure the new detail page.

Note: The standard page you created in Winter ’18 for navigation will not be automatically deleted. If it’s not referred to by any other component, you can manually delete it from the Pages menu.

CMS Connect (JSON) has new, configuration fields.

When editing an existing JSON connection, the Connection Type will be Public by default and Content Type, Title, and ID will be empty. Title and ID will have to be filled before the connection will be able to be saved again.

Note: You can have only one Content Item per Type and it’s necessary to define a Content Item for navigation support.

If you have multiple Content Lists and a single Content Item in an existing connection, when you edit your CMS Connection a single Content Type will be created in the JSON section with the Content Item and Content Lists assigned to it.
If you have multiple Content Items and Content Lists, when you edit your CMS Connection you will have one Content Type with a single Content Item and all of your Content Lists under it. The remaining Content Items will each be in a separate Content Type.

All the changes that apply to subsequent updates.

</td></tr>
<tr><td>Spring ’17 and Summer ’17 Customer Service, Partner Central, and Lightning Bolt solutions</td><td>

Decoupling of the search box from the site header, making it easier to insert your own search experience within a site.

Note: The Search page in the Winter ’18 version of the Customer Service (Napili) template doesn’t include the Headline component out of the box. If

</td></tr>
</table>

My Current Template Type and Version	What Can I Expect When Updating to Spring '19?
	your site's Search page includes the Headline component, it's removed as part of the upgrade. • Sleeker header component improves your site's mobile experience, leaving more room to show what's important to your site. • Out-of-the-box UI improvements, such as improved spacing in text fields. • Streamlined new Global Search for Peer-to-Peer Sites. • Upgraded, high-performance navigation menu that offers more styling options and reduces the need for CSS overrides. If you have applied CSS customizations, migrate them to the upgraded navigation menu. Note: Overriding CSS isn't recommended. The best way to update the styling of your navigation menu is to use the Theme panel in Experience Builder. To update existing CSS overrides see CSS mappings for updated components. • Adoption of Lightning Design System principles in all content layouts. • Two new branding options: Navigation Background Color and Navigation Text Color. • All the changes that apply to subsequent updates.
Winter '16 to Spring '17 Customer Service (Napili)	• Login pages retain branding but lose custom code or component customizations. • All the changes that apply to subsequent updates.
Pre-Winter '16 Koa, Kokua, or Customer Service (Napili)	Most component customizations and properties are overwritten. However: • For Koa and Kokua, general settings, such as Category Group Name, Top-Level Category, and Company Name, carry over. • For Customer Service (Napili), topic definitions carry over. • All the changes that apply subsequent updates.
Pre-Spring '16 Aloha template	Most branding properties defined using the Branding Editor in Experience Builder are maintained. However, sometimes your site's colors are reset to the default value. After you update the template, check the branding properties and update the ones that were reset
Salesforce Tabs + Visualforce	Template updates for sites using Salesforce Tabs + Visualforce aren't managed from Experience Builder.

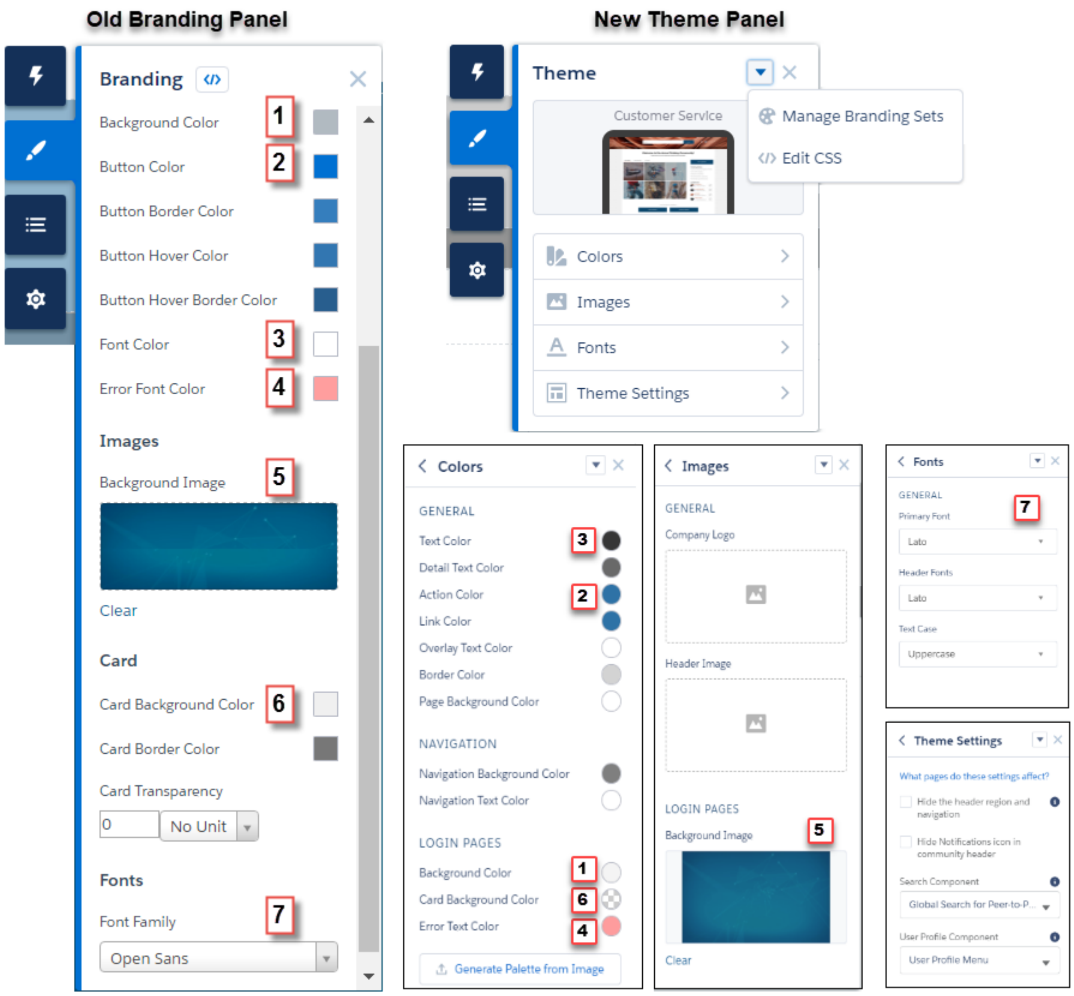
For information on component compatibility with older template versions, see Which Components Can I Use with Each Template?

To update your template:

1. In Experience Builder, click ⚙ > **Updates**.
2. Click **Update** and confirm the update when prompted.
3. Make sure that your login pages look correct, and reconfigure missing branding properties, custom code, and component customizations.

4. Publish your site to apply the template updates.

If you are upgrading from a pre-Winter '18 template, some of the old branding properties are reorganized but still there, while others map to different properties. Let's take a closer look at the changes.



Pre-Winter '18 branding properties ...	Map to these updated branding properties ...
Background Color (1)	Background Color (1)
Button Color (2)	Action Color (2)
Button Border Color	—
Button Hover Color	—
Button Hover Border Color	—
Font Color (3)	Text Color (3)
Error Font Color (4)	Error Font Color (4)
Background Image (5)	Background Image (5)

Pre-Winter '18 branding properties ...	Map to these updated branding properties ...
Card Background Color (6)	Card Background Color (6) Also controls card transparency
Card Border Color	—
Card Transparency	—
Font Family (7)	Primary Font (7)

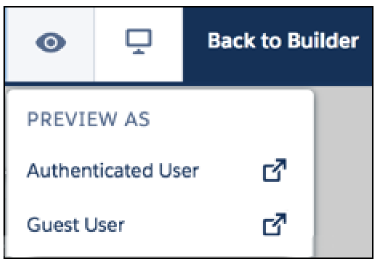
SEE ALSO:
Experience Builder Settings
Experience Builder Overview
Considerations for Changing Your Template

Preview Your Experience Builder Site

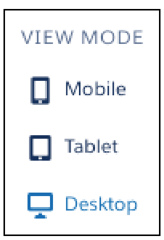
Before going live, you can preview your Experience Builder site to see how it looks in a desktop browser window or on a mobile device.

- To preview the site in a browser window, click **Preview** on the toolbar.

- In Preview mode, to see the site in its own browser tab as:
  - A logged-in customer would see it, click > **Authenticated User**.
  - An unauthenticated visitor would see it, click > **Guest User**. As long as your site includes one public page (such as the Home page), you can use the **Guest User** option.



- To preview the site on different devices, use the options in the menu.



SEE ALSO:

Experience Builder Overview

Publish Your Experience Builder Site Customizations

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To create an Experience Cloud site:

- Create and Set Up Experiences AND View Setup and Configuration

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

Publish Your Experience Builder Site Customizations

Publish your site in Experience Builder to make your branding and component customization updates available to your site's members.

Tip: Publishing an Experience Builder site for the first time makes the site URL live and enables login access for site members. Unlike Salesforce Tabs + Visualforce sites, you don't need to activate an Experience Builder Site unless you want to set up SEO and send out a welcome email.

1. In Experience Builder, preview your site to make sure that your updates appear as expected.
2. When you're happy with your changes, click **Publish** in the toolbar to publish your changes.

   Important: *All* changes made to a site since the last time it was published are included.

An email notification informs you when your changes go live.

SEE ALSO:

Experience Builder Overview

Preview Your Experience Builder Site

EDITIONS

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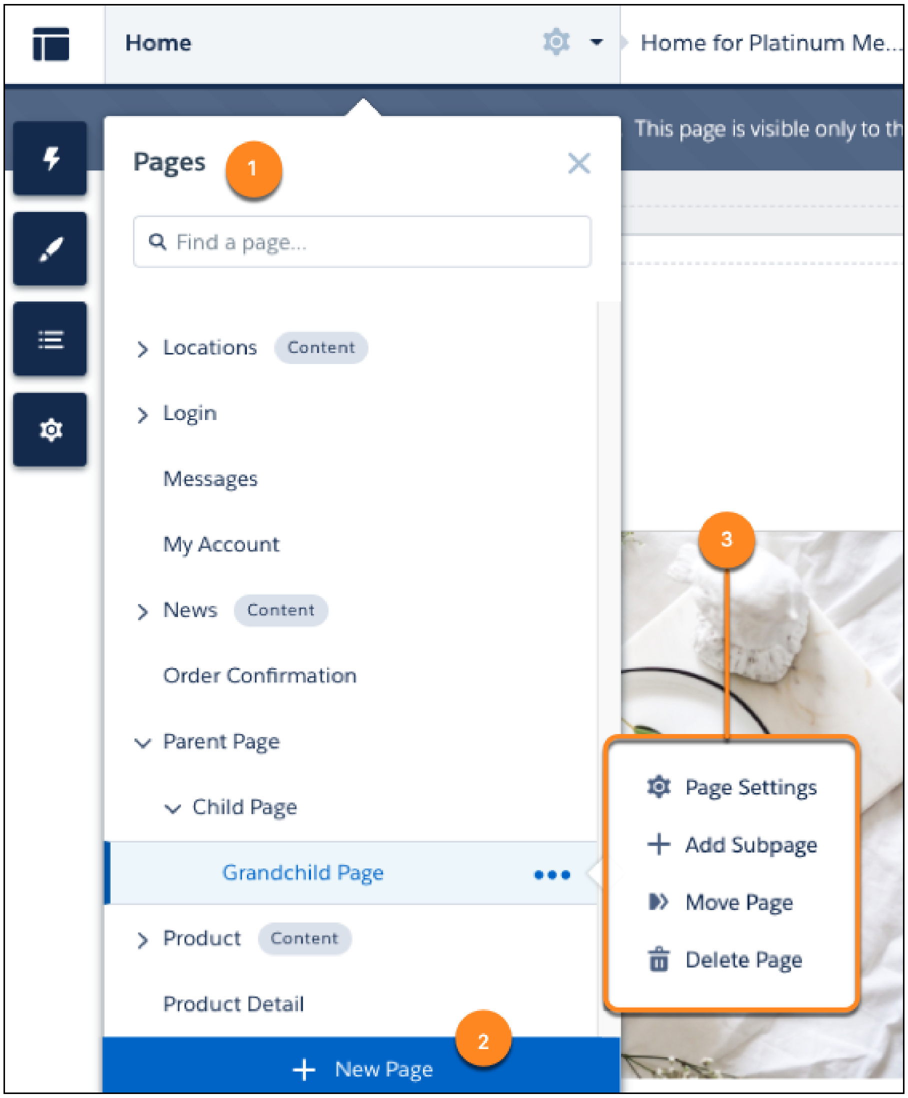
Manage Your Site's Pages and Their Properties in Experience Builder

The Pages and Page Action menus centralize all your page-related needs, from page creation to audience criteria-based page visibility and everything in between.

From the Pages menu (1), you can search for a page, add a page (2), or click [•••] to access the Page Action menu (3).



From the Page Action menu, you can:

- Click **Page Settings** to edit a page's properties, such as its URL, layout, or variations.

  From Page Settings, click **Page Variations** to create alternative versions of a page and set audience criteria for the page's visibility. If the selected page isn't a template, you can easily delete it and its page variations with a single click.

EDITIONS

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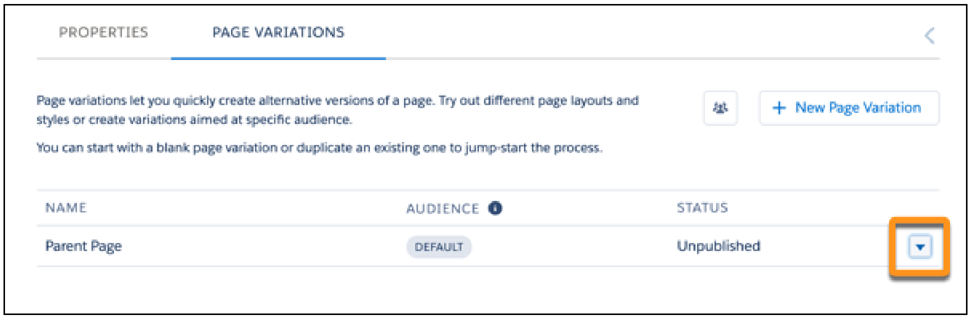
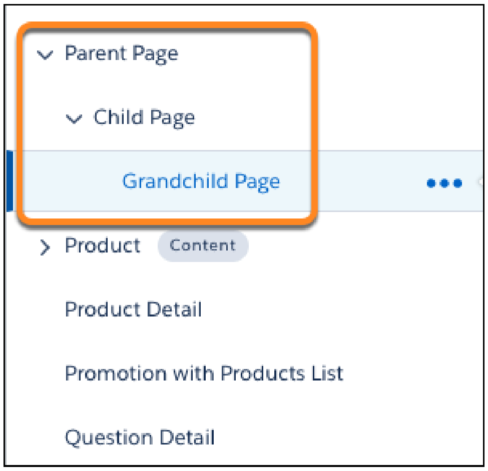
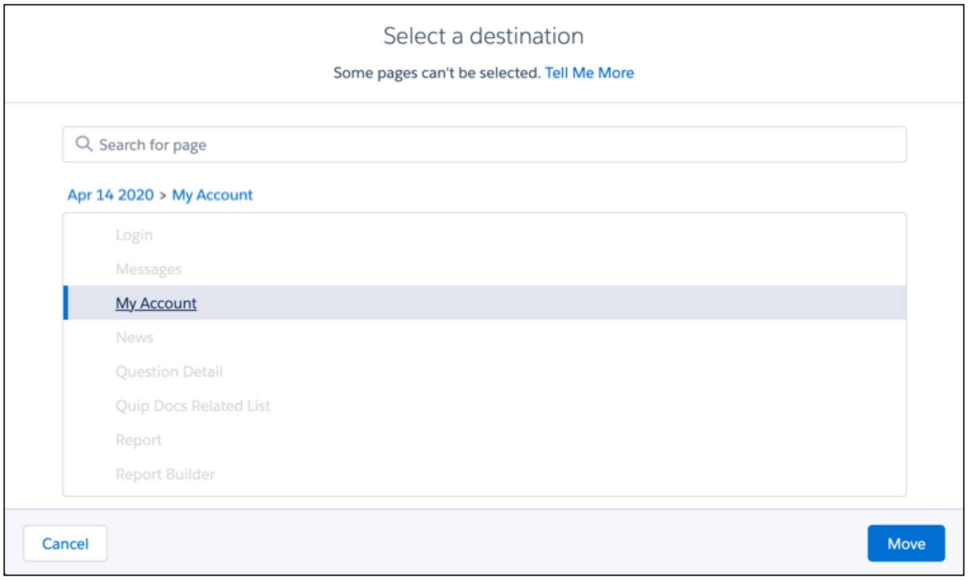


- Click **Add Subpage** to build out your site's hierarchy with up to six page levels by nesting a standard, object, or content page under an existing page.

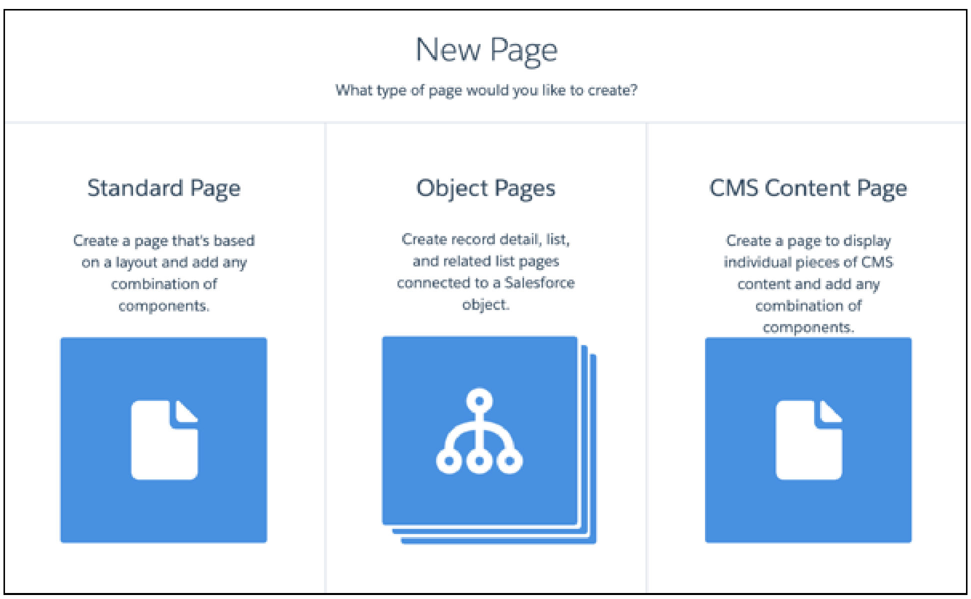


- Click **Move Page** to change your page hierarchy and move a page and its subpages to a new destination. When you move a parent page, the URLs for its subpages update automatically to reflect your changes.



- Click **Delete Page** to remove a page from the Pages menu. When you delete a parent page, its subpages are also deleted.
- Note: Not all pages have the Move Page, Add Subpage, and Delete Page options in the Page Actions menu. Review Considerations for Page Actions in Experience Builder.

Click **+ New Page** at the bottom of the Pages menu to create a standard, object, or custom page.



IN THIS SECTION:

Page Properties and Types in Experience Builder

Use the Page Action menu to view and edit the properties of the pages that make up your Experience Builder site.

Considerations for Page Actions in Experience Builder

When you create and organize pages in your Experience Builder site, some pages behave differently than others. Keep these page management considerations in mind when you use the Page Action menu.

Use a Custom Service Not Available Page for Your Experience Builder Site

Maintain business continuity with customers and allow them to log cases when your site is down using the Service Not Available page in Experience Builder. Use the HTML Editor component in Experience Builder to customize the page provided. To customize the page with images, fonts, and colors that fit your brand, you can replace the HTML Editor component with Rich Content Editor components.

Edit Pages and Components in Experience Builder

Each page contains a collection of components that are organized around a task or function, whether it's opening a case or searching for an article. The pages that comprise each Experience Builder template are ready for you to use with little configuration. Add new components to your site's pages, edit the properties of existing components, or delete components that you don't require.

Create Custom Pages with Experience Builder

Create custom pages to extend your Experience Builder template. Add custom record detail, list, and related list pages to get the most from your Salesforce data.

Add Markup to the Page <head> to Customize Your Experience Builder Site

Add custom analytics, improve your SEO results, and more by adding custom markup to the page `<head>` in Experience Builder. For example, you can include SEO meta tags that are visible only to search engines, add a *favicon*, or add custom code for Adobe Analytics and Google Tag Manager.

Personalization Using Audience Targeting in Experience Builder Sites

Audiences are sets of criteria used to define user segments. Use them to keep your users engaged by offering them personalized, relevant content in a customized site.

Use Visualforce in Experience Builder Sites

If you've created Visualforce pages, actions, buttons, links, and canvas apps for your Salesforce Tabs + Visualforce template-based sites, they can be used in Experience Builder sites.

Add Streams to Your Experience Builder Site

Your site users can combine multiple feeds into a stream to create a single point of access to related information. Combine feeds of top contributors or discussions concerning a particular product line. Create a stream that combines feeds from discussions, groups, topics, profiles, and all kinds of objects, like cases, opportunities, and accounts. No more jumping from feed-to-feed to get a sense of what people are saying. Each member can create up to 100 streams.

Page Properties and Types in Experience Builder

Use the Page Action menu to view and edit the properties of the pages that make up your Experience Builder site.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

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Page Types

Experience Builder sites comprise several types of pages.

Standard Pages
: The default pages that come with the Experience Builder template or that you create.

Object Pages
: The pages of the objects in your site, which include the object's record detail, list, and related list pages.

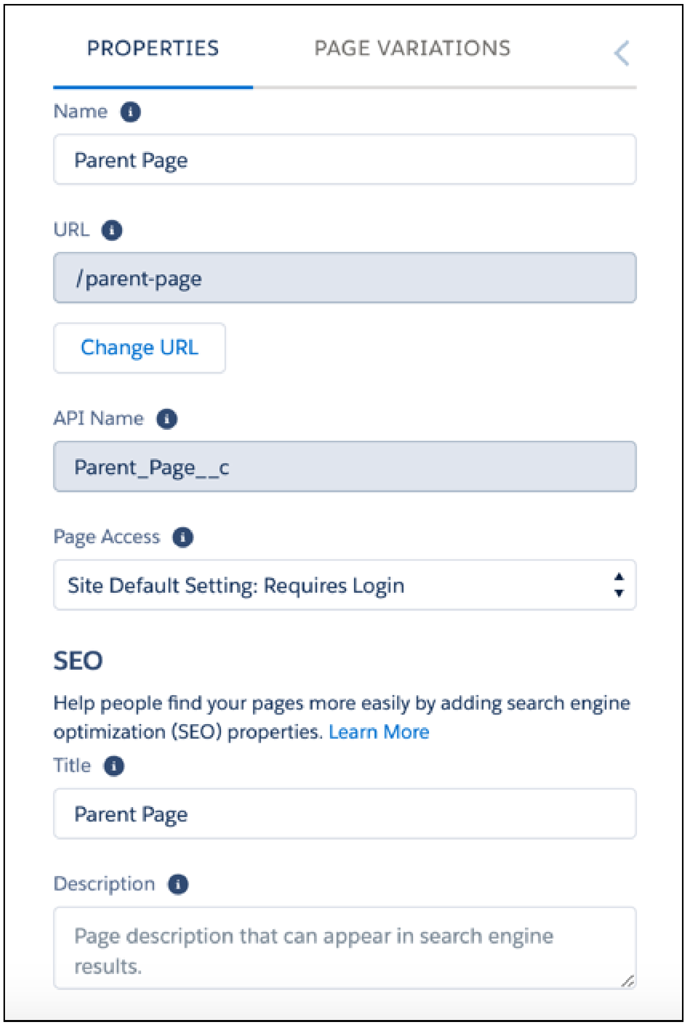
  Generic object pages are used to display record information for a Salesforce object when custom object pages don't exist.

Content Pages
: The content pages that you create to display your Salesforce CMS content.

Login Pages
: The default login pages that come with the Experience Builder template.

Page Properties

To edit a page's properties, open the Pages menu in Experience Builder. Then, click ••• to open the Page Action menu and select **Page Settings**. The properties available to each page depend on the selected page type.



Name

The name of the page as it appears in Experience Builder. Editable only in the standard pages that you create.

URL

The URL of the page. Editable only in custom standard pages.

Manage the URLs for each page after creating your page hierarchy. Anytime you move pages around and alter the page hierarchy in your site, the subpage URLs automatically update to reflect your changes.

Note: The site URL for each page reflects the structure you set up in Experience Builder when you share the live site with your users.

Note: Some pages can't be moved. Review Considerations for Page Actions in Experience Builder.

API Name

A unique name you define when you create a page.

Page Access

Specifies the level of access to the page. When you enable public access, guest users can view asset files on public pages by default. More restrictive profile settings can prevent certain users from viewing this page, even if you choose Public. Page access for some pages, like My Account, is automatically set to require users to log in and can't be modified.

When you enable public access, the preference **Let guest users view asset files and CMS content available to the site** in **Administration** > **Preferences** is automatically enabled.

Title

The SEO title of the page. Shown in search engine results, the browser's tab or window title, and bookmarks.

For data-based pages, such as object and content pages, the title is set dynamically.

Description

The SEO description of the page. Shown in search engine results to help people decide if this page is the one they want.

For data-based pages, such as object and content pages, the description is set dynamically.

Meta Tags

Provides the opportunity to enter specific `meta` tags for the page to assist search engine optimization for your site.

For data-based pages, such as object and content pages, you can enter expressions to access values from the record associated with the page, such as the name, title, and value of specific fields.

Content Layout
Defines the content regions of your page, such as a two-column layout.

Theme Layout
By selecting **Override the default theme layout for this page**, you can choose to apply a different theme layout for the page.

SEE ALSO:

Change the Theme Layout of Your Experience Cloud Site's Pages

Change the Content Layout in Experience Builder

SEO for Experience Builder Sites

Experience Cloud Developer Guide: Create Custom Content Layout Components for Experience Builder

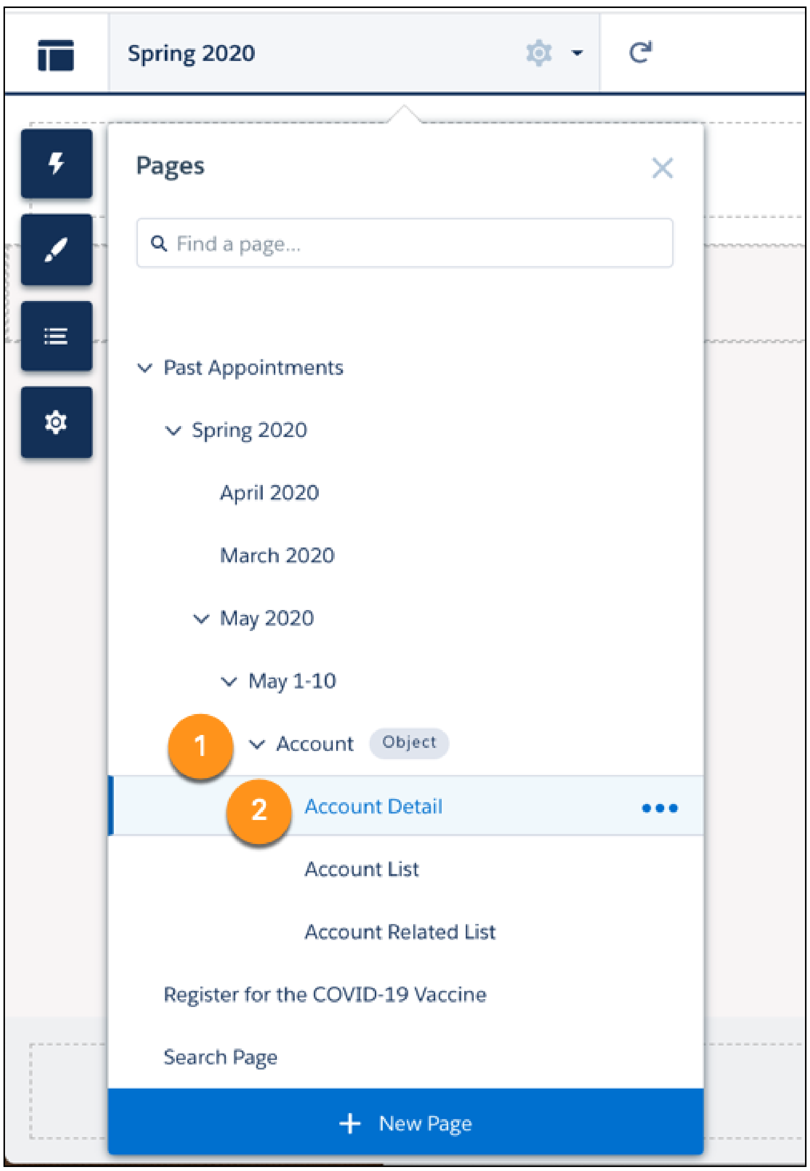
Considerations for Page Actions in Experience Builder

When you create and organize pages in your Experience Builder site, some pages behave differently than others. Keep these page management considerations in mind when you use the Page Action menu.

Page Level Limits

You can have up to six levels of pages when you use the Page Action menu to add subpages or move pages. Because of this limit, the option to add a subpage or move a page within your page hierarchy is disabled from the Page Action menu.

When you create an object page, a page base (1) is created on one level, and the Detail, List, and Related List subpages (2) are created on a second level. When you create a content page, its Content Detail subpage is also on the second level.



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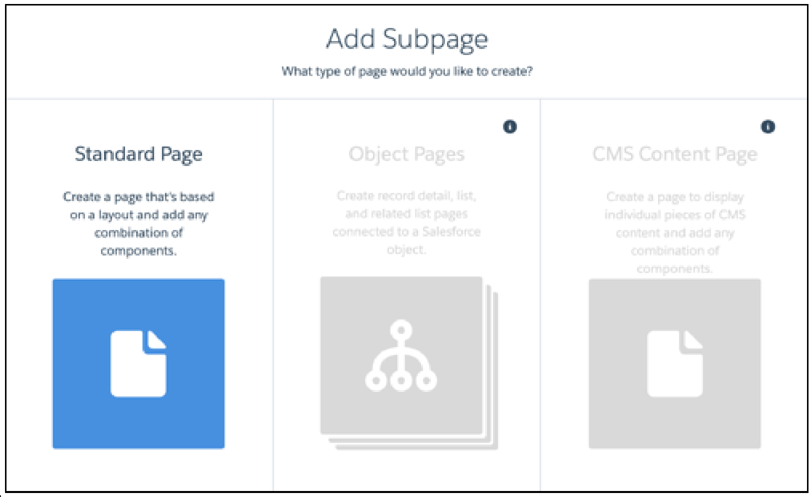
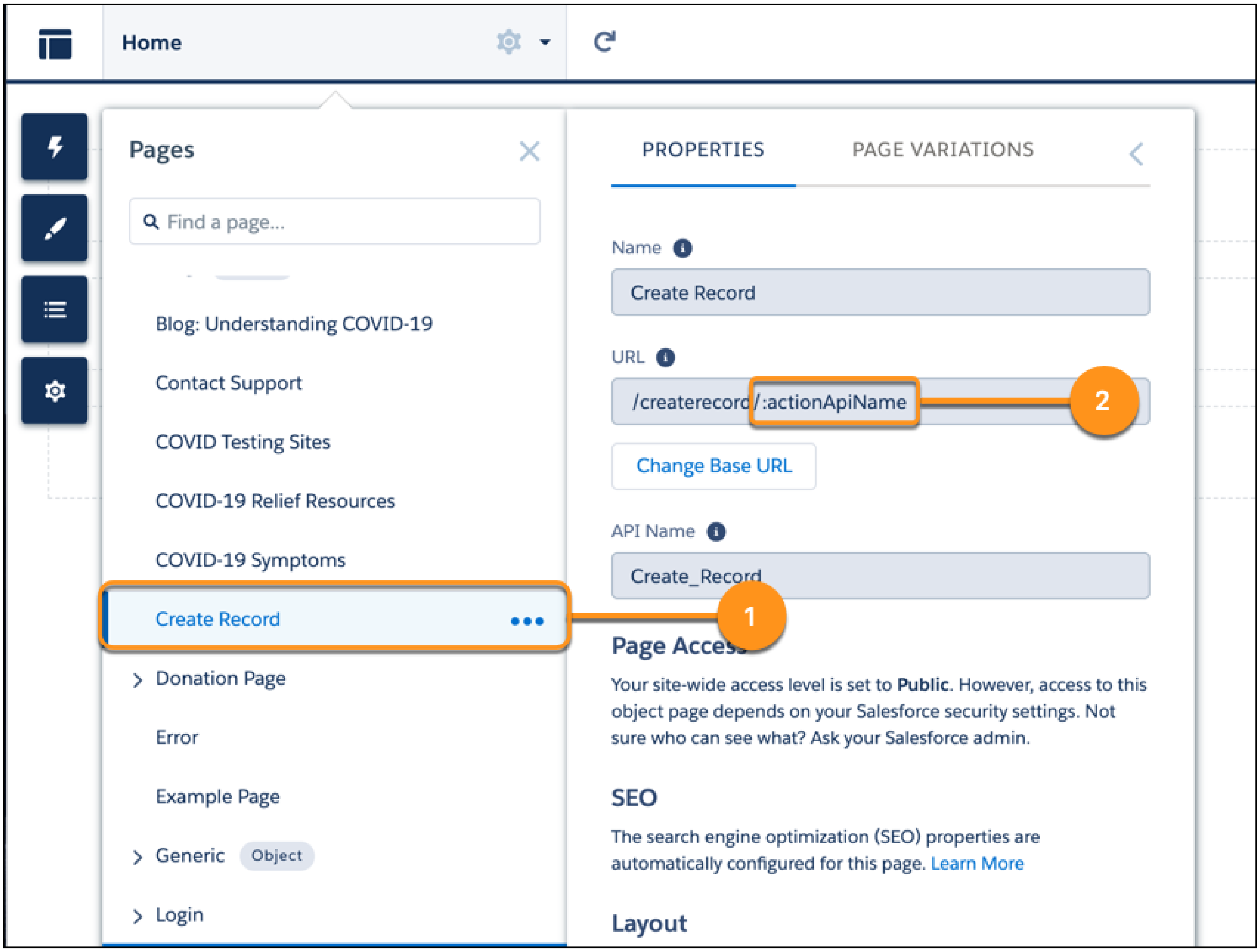
Because object and content pages take up two levels, adding them under the fifth level of an existing hierarchy exceeds the level limit of six pages. When a page is on the fifth level of the page hierarchy, you can only add a standard page as a subpage. The object and content pages are disabled and can't be added.



Dynamic URL Conflicts

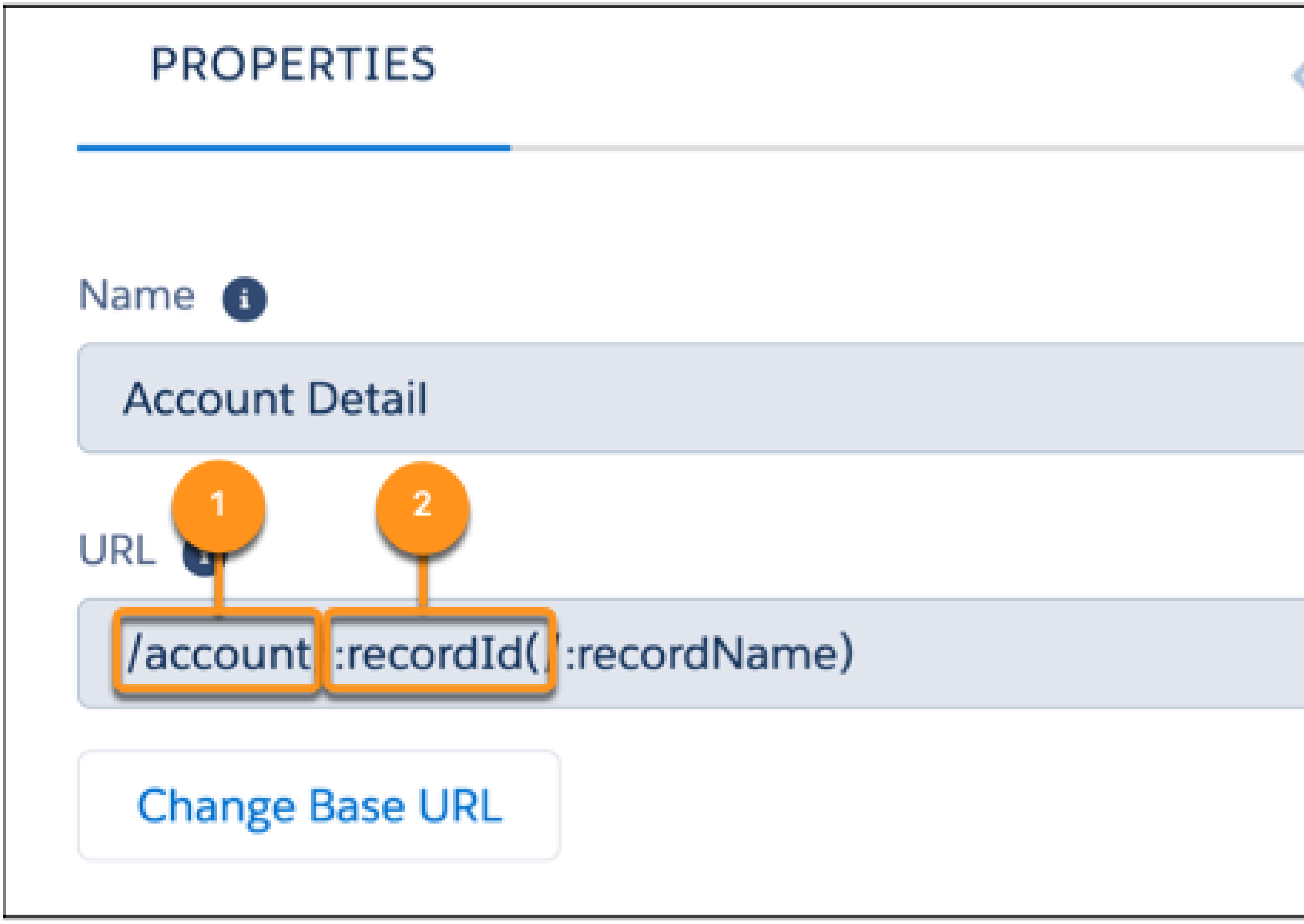
Some preconfigured pages (1) in your site contain a dynamic portion in the page URL, indicated with specific parameters (2).

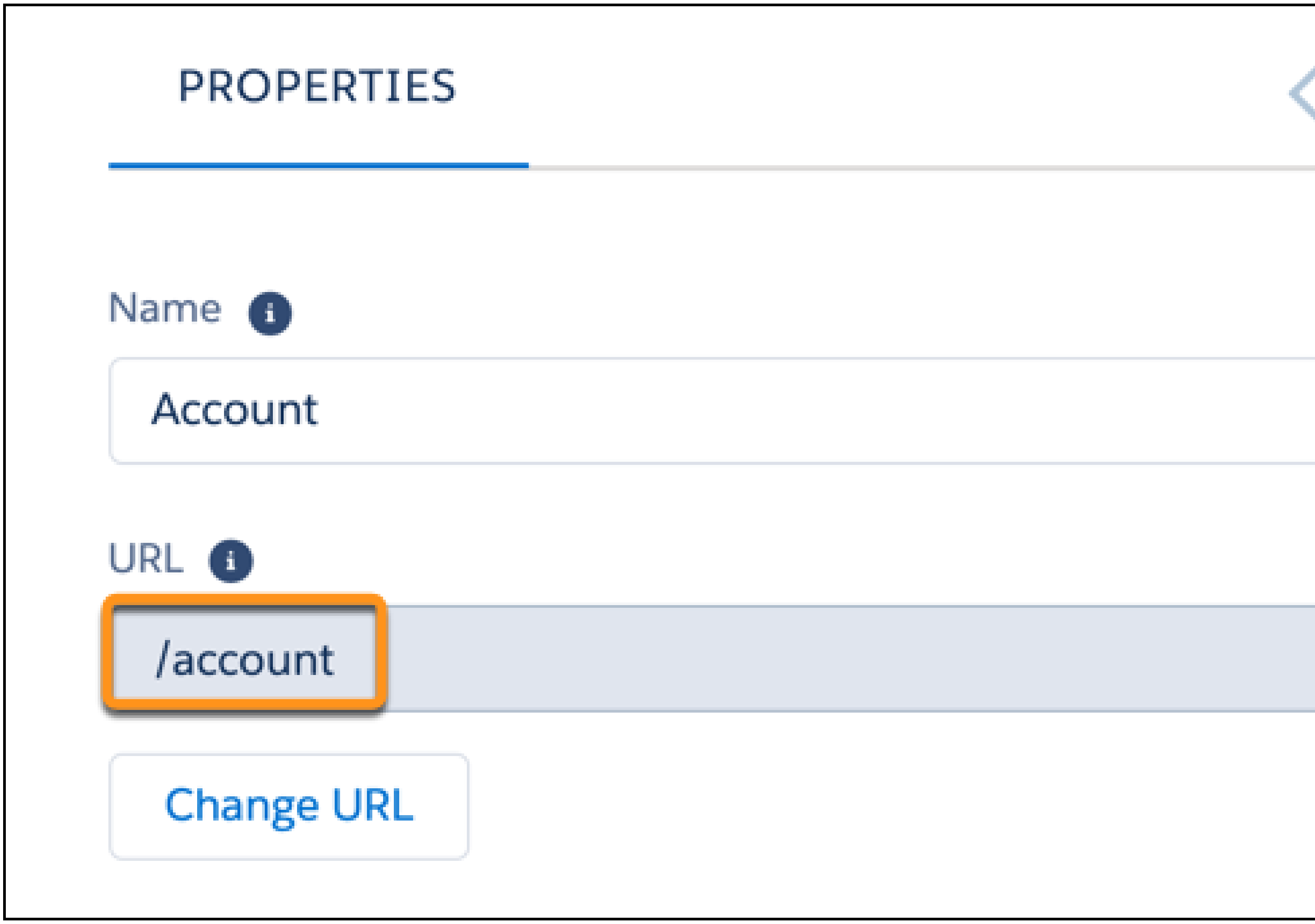


To avoid URL conflicts, the Add Subpage option is always disabled for these pages, and other pages can't be moved under them.

General URL Conflicts

A page that exists at the same level as another page with the same base URL (1) and has a dynamic URL (2) can't have subpages.


PROPERTIES
Name
Account Detail
URL
1
2
/account
:recordId(
:recordName)
Change Base URL

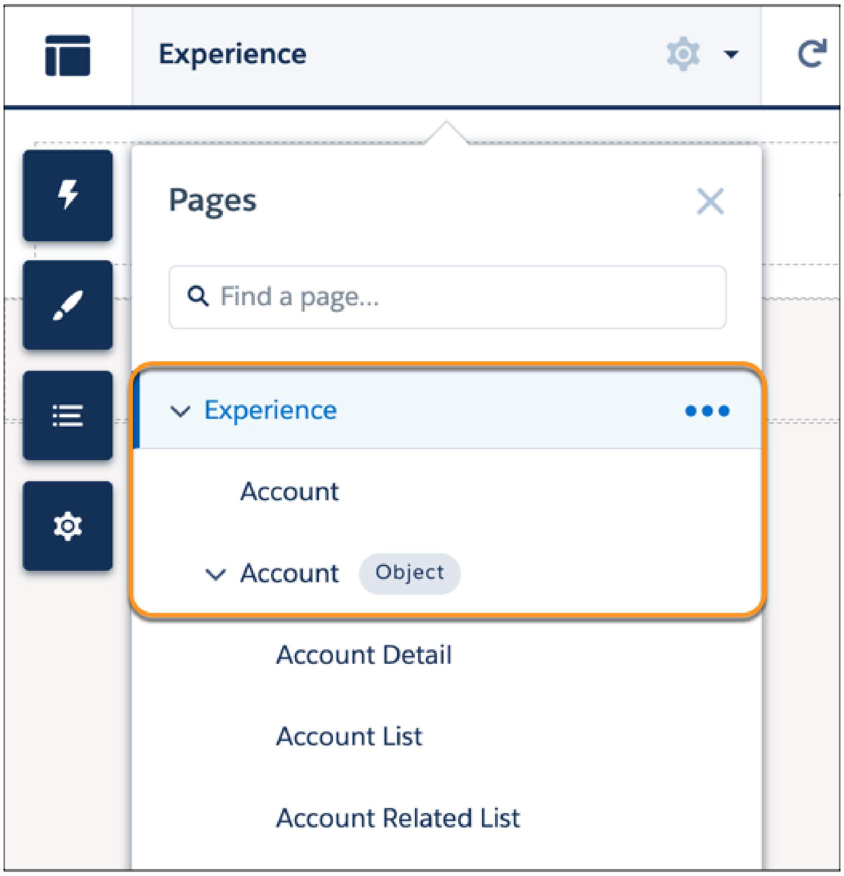


In this example, the Account standard page and the Account object page have the same base URL, /account/. To prevent URL conflicts, the Add Subpage feature is disabled for the Account standard page.

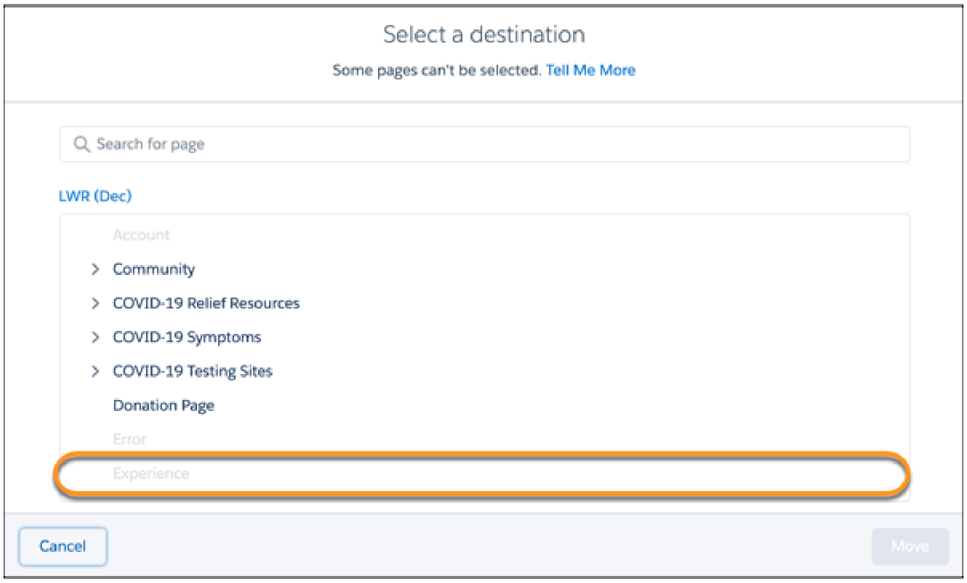
Tip: To add a subpage when this feature is disabled for a standard page, you can change either page's base URL. To change the standard page's base URL, first, go to Page Settings from the Page Action menu, then click **Change URL**. You can also change the other conflicting page's URL because all related subpages are updated with the new URL.

Now let's say the Account standard page is a subpage of another standard page in your site.

When the Account standard page has no subpages of its own, you can move the Account object page under the Experience page as an immediate subpage. Here, the Account standard and Account object pages can exist on the same level within a single page hierarchy.



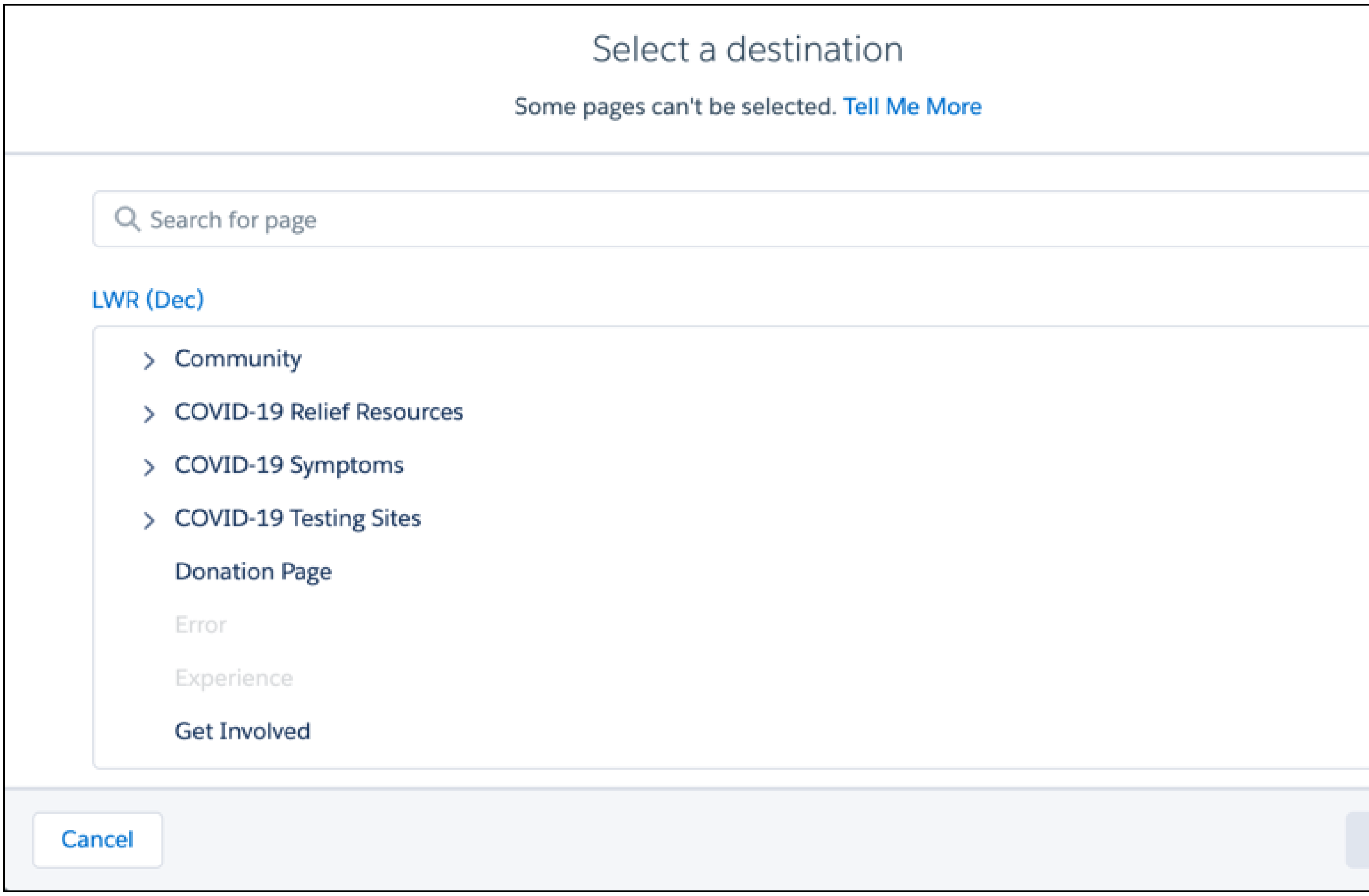
But if the Account standard page has a subpage, the Account object can't be in the same page hierarchy at the same level as the Account standard page. In this case, the base URLs of both pages conflict, which means that you can't move the Account object page under the Experience page. When you click Move Page for the Account object page, the Experience standard page and its subpages are disabled as destinations.



Note: The Add Subpage option is always disabled for pages with dynamic URLs, such as object and content pages, to avoid URL conflicts with their default subpages.

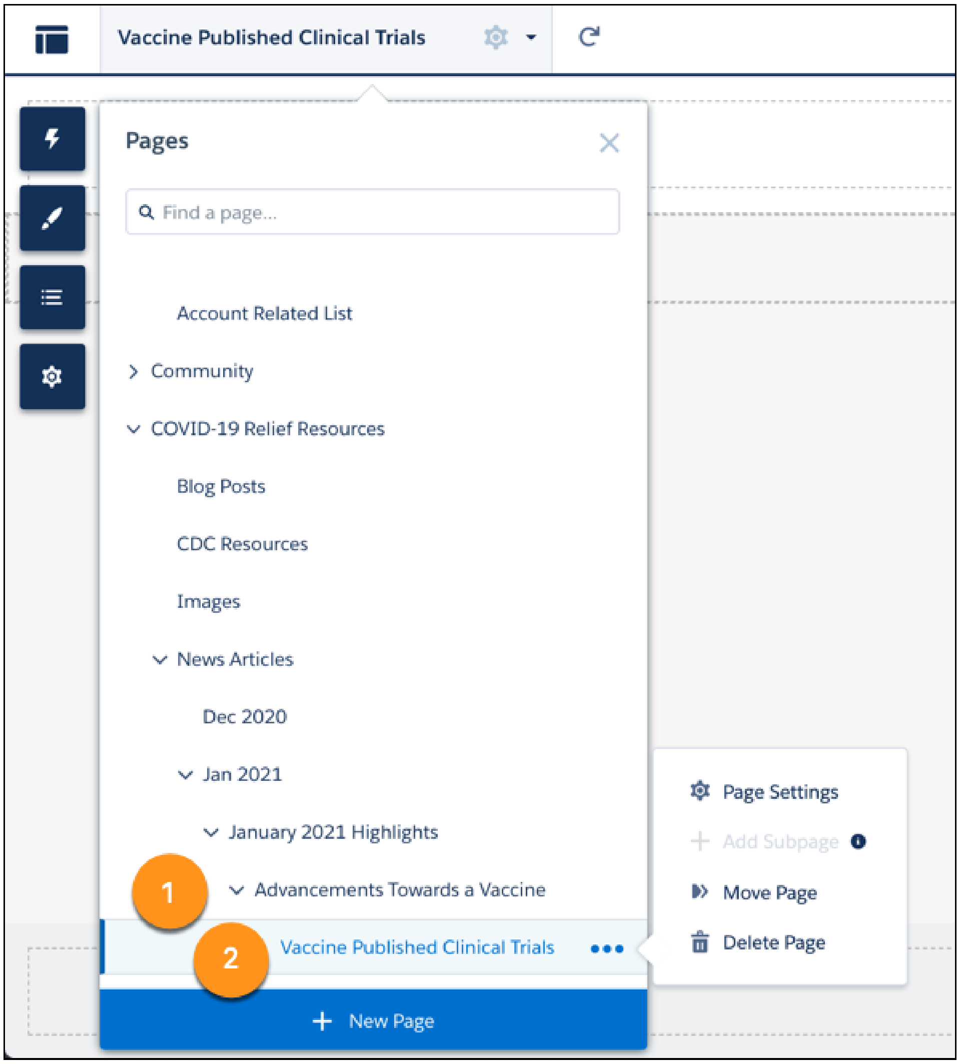
Move Page Conflicts

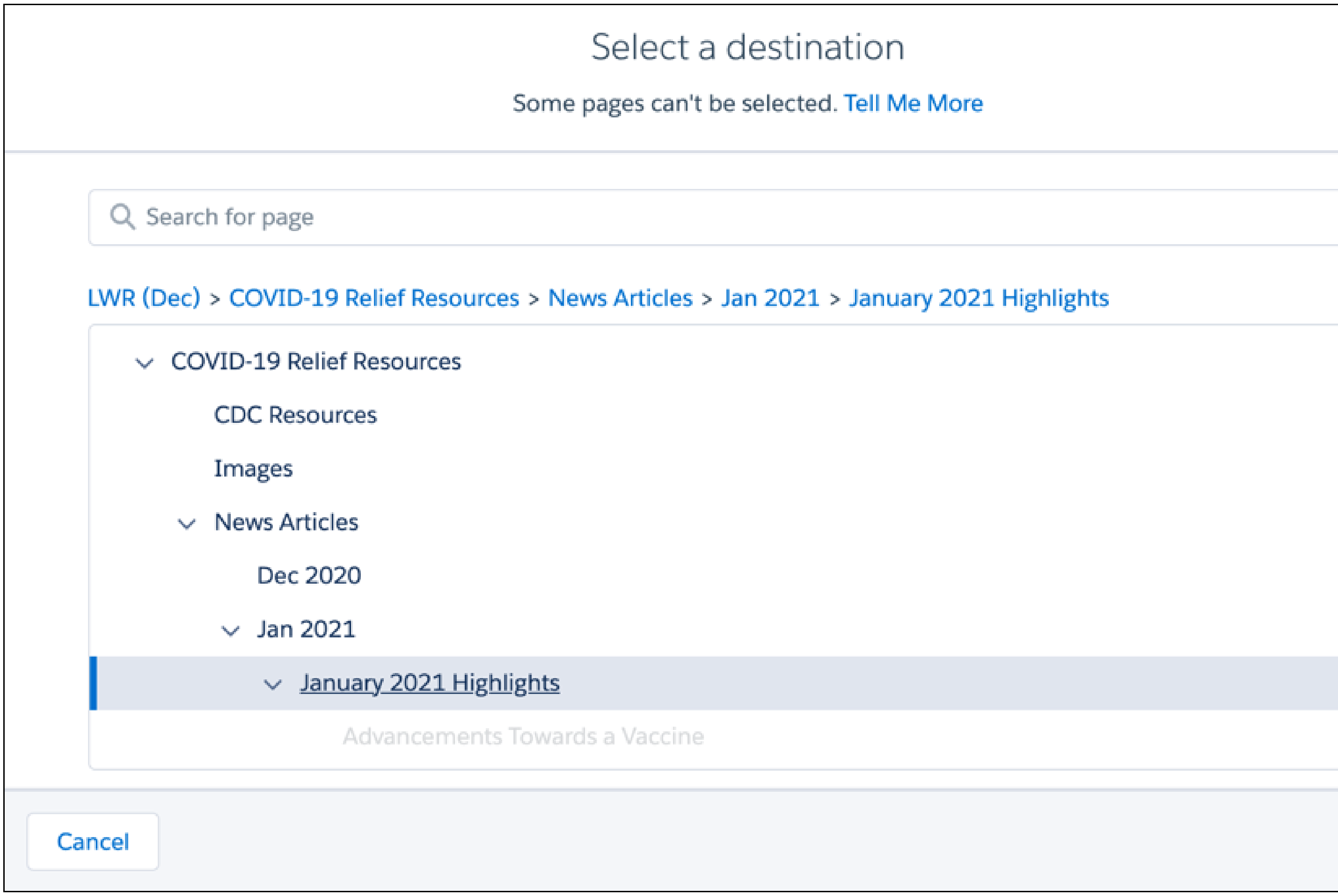
From the Select a destination dialog, you can select a parent page to move your selected page under. Some pages are disabled because they can't be parent pages for the page that you want to move.



Some possible reasons include:

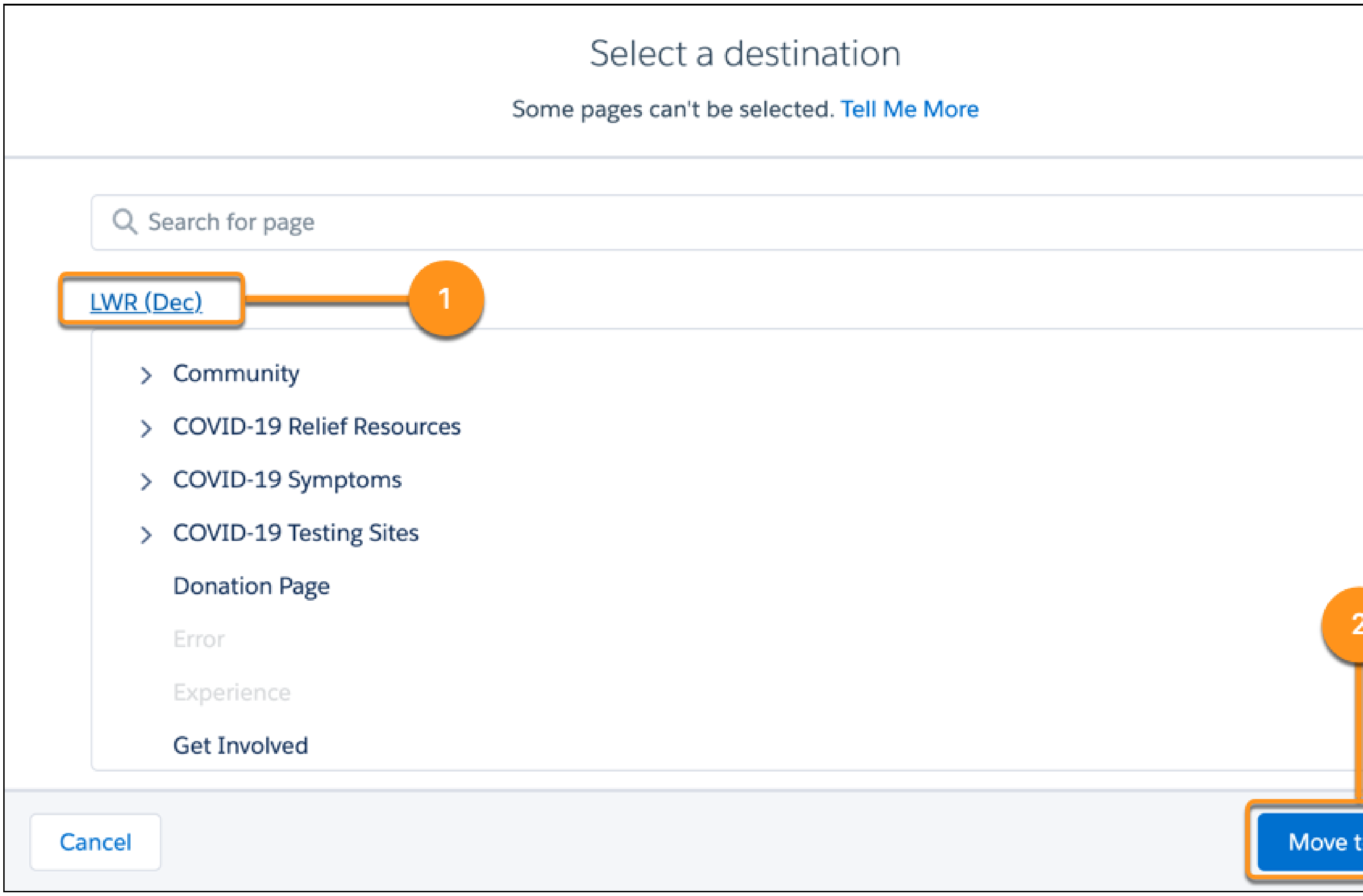
- Page Level Limits: You can’t move a page under a parent page that results in a page hierarchy exceeding six levels. Say you want to move a page with a subpage, such as an object page, under a new parent page. You can only select a destination page up to the fourth level because the object page’s current page hierarchy consists of two pages. Moving it to a fifth (1) or sixth (2) level page exceeds the six-level limit of the new parent page’s hierarchy.


Vaccine Published Clinical Trials
Pages
Find a page...
Account Related List
Community
COVID-19 Relief Resources
Blog Posts
CDC Resources
Images
News Articles
Dec 2020
Jan 2021
January 2021 Highlights
Advancements Towards a Vaccine
Vaccine Published Clinical Trials
New Page
Page Settings
Add Subpage
Move Page
Delete Page
1
2



- URL conflicts: Review the suggestions in Dynamic and General URL Conflicts to easily move pages around in your site.
- Some pages are always top level and can't have subpages: Examples include the Home, Login, and Flow pages, as well as pages in the B2B template: Checkout, Flow, Order, and Confirmation. You can't move these pages or move other pages under them.

From the Select a destination dialog, you can move a page to the top level when you click the site name (1) and then click Move to Root (2).



The Move to Root button is disabled if a page is already at the top level in your page hierarchy. It's also disabled when the page you want to move has a URL conflict with an existing top-level page.

Note: Review the suggestions under General URL Conflicts to move your page to the top level.

Use a Custom Service Not Available Page for Your Experience Builder Site

EDITIONS

Available in: Developer, Performance, Professional, and Unlimited editions.

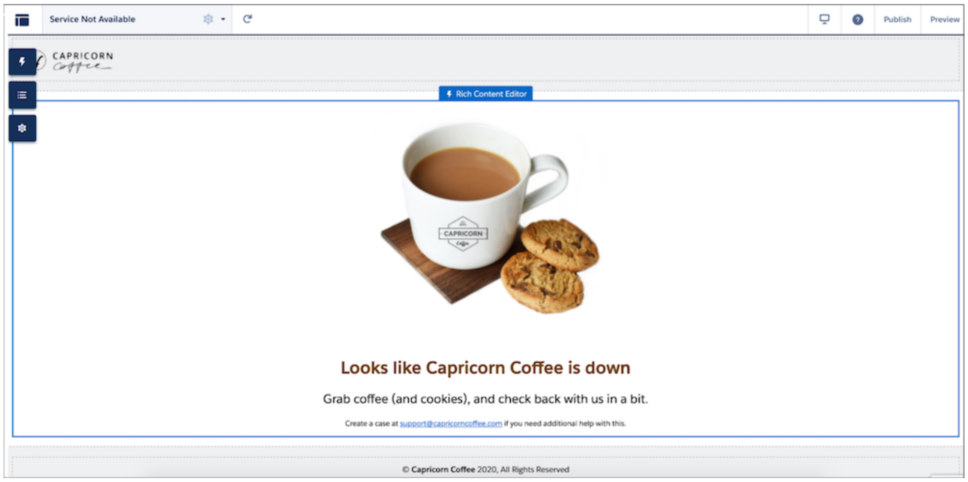
Maintain business continuity with customers and allow them to log cases when your site is down using the Service Not Available page in Experience Builder. Use the HTML Editor component in Experience Builder to customize the page provided. To customize the page with images, fonts, and colors that fit your brand, you can replace the HTML Editor component with Rich Content Editor components.

This feature is available for sites that have enabled the standard content delivery network (CDN) system with a custom URL set for your site.

Enable the Service Not Available Page in Experience Builder

The Service Not Available page is an offline page. It only appears when a site isn't available. When the site is up and running, the Service Not Available page has no impact on the user's experience of the site.

You can customize the layout, and configure the colors, fonts, images, and sizes using the Simple Theme Layout for the Service Not Available page. HTML Editor and Rich Content Editor can be used to update the content (including language) and images on the Service Not Available page. Custom components aren't available for this page. The Service Not Available page has its own theme with header and footer that can be customized. Some standard Experience Builder features aren't available for this page, such as SEO settings, public page settings, and progressive rendering.



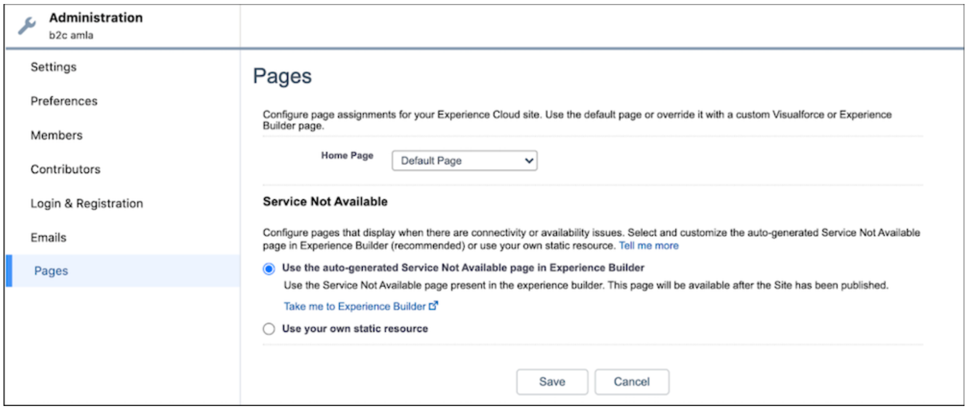
You have different configuration options, depending on whether you're using an Aura or LWR site. If you're using an LWR site, you can update the Service Not Available page layout from a single column. If you're using an Aura site, you can only use a single column for the layout. Audiences and Page Variations features of Aura sites aren't available for this page.

To access the Service Not Available page in Experience Builder:

- From the global header menu in **Experience Workspaces** or **Experience Management**, click **Experience Workspaces** > **Builder** or **Experience Management** > **Go to Experience Builder**.
- From the All Sites page in Setup, click **Builder** next to the site name.
- From a site, click **Experience Builder** in the profile menu.
- Navigate to the Service Not Available page using the Pages menu and clicking **Service Not Available**. To make it available for use, click **Publish**. The Service Not Available page isn't available until the site is published.

The Service Not Available page is enabled by default, unless the customer is using their own static resource. Sites configured with a custom static resource for their Service Not Available page, continue to display the custom static resource. To enable Service Not Available page instead of using your own static resource:

1. Click the Experiences Menu icon.
2. Select **Administration** > **Pages**.
3. Check the radio button next to **Use the auto-generated Service Not Available page in Experience Builder** and save your changes.
4. To make it available for use, publish the page. The Service Not Available page isn't available until the site is published.



Note: Custom pages named Service Not Available prevent Salesforce's standard Service Not Available page from automatically migrating to your org. To replace a custom page named Service Not Available with Salesforce's standard Service Not Available page, rename the conflicting custom page. Contact Salesforce Customer Support if you need further assistance.

If you aren't sure whether your Service Not Available page is enabled, you can check the banner at the top of the page. If enabled, a banner message informs you that the Service Not Available page displays when the site is down. If you haven't enabled it, the banner message informs you that the page is disabled.

Service Not Available Page in Experience Bundle

The Service Not Available Page also exists as a service-not-available route type in Experience Bundle. Developers must update their file in order to avoid getting an error on missing this route type.

Maintain Business Continuity with Email-to on the Service Not Available Page

To maintain business continuity and allow users to log cases when the site is down, you can enable Email-to-Case on your Service Not Available page. First set up Email-to-Case, then encourage your users to use the configured email to submit cases using your Experience Builder Service Not Available page. You can also enable users to create additional records from your Service Not Available page, beyond cases, using Email-to- packages found on AppExchange.

Maintain a Consistent Experience Between Your Experience Builder and Visualforce Sites

You can display the same Service Not Available page on your Experience Builder and Salesforce Tabs + Visualforce sites. After you've customized your page in Experience Builder and have published it to your site, it automatically becomes a static resource for your org. This static resource must be 5 MB or smaller. To use the page on your Visualforce site:

1. Open **Experience Workspaces** or **Experience Management**.
2. Navigate to **Administration** > **Pages**.
3. Click next to Service Not Available to search for the Service Not Available static resource generated for your Experience Builder site. Upload it as a static resource.
4. Save your changes.

SEE ALSO:

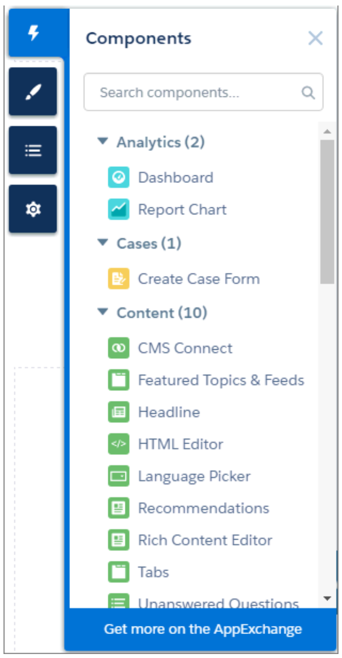
Set Up Email-to-Case
Use a Custom Service Unavailable Page in Your Salesforce Tabs + Visualforce Site

Edit Pages and Components in Experience Builder

Each page contains a collection of components that are organized around a task or function, whether it's opening a case or searching for an article. The pages that comprise each Experience Builder template are ready for you to use with little configuration. Add new components to your site's pages, edit the properties of existing components, or delete components that you don't require.

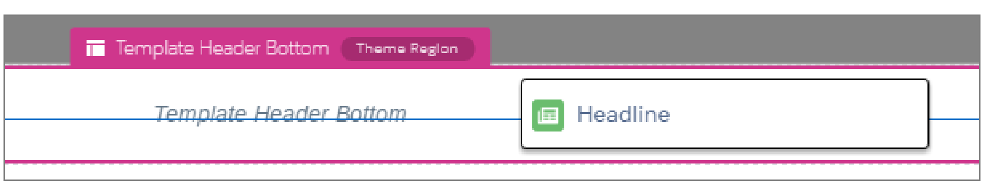
Tip: If you plan to add components to a new custom page, spend some time planning the composition of the page based on its purpose.

1. From the Pages menu in the top toolbar, select the page that you want to edit.
2. To open the Components panel, click .



   The Components panel lists only components that are compatible with the selected page. For example, you can't add the User Profile Detail component to the Home page.

3. Drag the required component from the Components panel onto an editable area of the page. When you drag a component over a content or theme layout region, a label appears to help you identify the region. Components in theme layout regions are shared everywhere that theme layout region is used and we add the label "Shared" to the component name. Components in a content layout region are specific to the page.



4. To edit the properties for a component on the page, select it on the main page canvas or on the Page Structure panel. When you select a component, Experience Builder highlights the component with a blue border and displays the component's properties in the floating property editor.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

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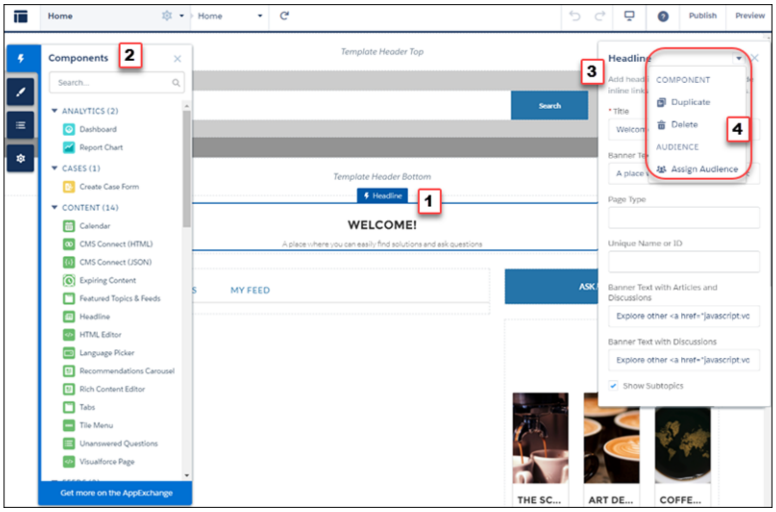
5. Update the component as required.

Example: Here's a sample configuration of the Headline component (1) on the Home page with the list of supported Lightning components (2) and properties (3). You can also quickly duplicate, delete, or assign an audience to the component to control its visibility (4).



Tip:

- You can browse a selection of custom Lightning components on the AppExchange and add them to your org directly from Experience Builder. Click **Get more on the AppExchange** in the Components panel. Components that are ready to add to Experience Builder pages are displayed. When you add a component, it appears in the Components panel of all the template-based sites in your org.
- You can also create custom Lightning components and use them on Experience Builder pages. For more information on creating custom Lightning components and enabling them for Experience Builder, see the *Experience Cloud Developer Guide*.

IN THIS SECTION:

Hide Components on Mobile Devices with Experience Builder

Reduce page load times and cluttered mobile screens by hiding non-business critical components on mobile devices. View your site in Builder using the mobile mode and select which components you wish to hide.

Error Messages for Pages Without Data in Experience Builder

When you build a template-based page using Lightning components in Experience Builder, sometimes the page doesn't load correctly. Find out why you see this error, and how you can fix it. Spoiler alert: Want to see a page? Make sure that the component has underlying data.

Hide Components on Mobile Devices with Experience Builder

Reduce page load times and cluttered mobile screens by hiding non-business critical components on mobile devices. View your site in Builder using the mobile mode and select which components you wish to hide.

1. In Experience Builder, change the view to Mobile.
2. Click the component you want to hide to open the properties panel.
3. Scroll to the bottom of the panel and click **Hide on Mobile**.

Note: You can also hide and unhide components by clicking **Page Structure**, and clicking the eye icon next to the component. The Page Structure button also displays the number of hidden components.

EDITIONS

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** editions

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Error Messages for Pages Without Data in Experience Builder

When you build a template-based page using Lightning components in Experience Builder, sometimes the page doesn't load correctly. Find out why you see this error, and how you can fix it. Spoiler alert: Want to see a page? Make sure that the component has underlying data.

EDITIONS

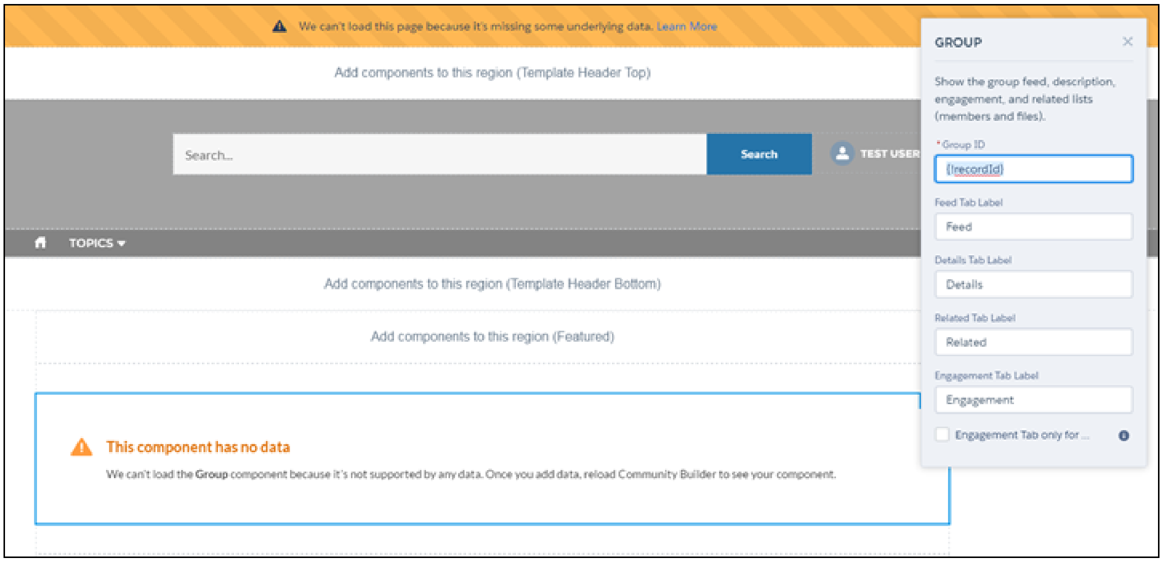
Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

An error occurs on site pages in one of the following three instances:

- The page doesn't have any components
- The page has one or more components, and one or more don't have any underlying data

You see this error when components rely on dynamic data, and they don't find any underlying data to draw upon. For example, a Group component that doesn't find a group ID, or a record that can't find a record ID, would both give you an error.



Why do I see this error?

In most situations, the page is trying to draw information where information doesn't exist. For example, let's say you make a record detail page for the Account object. If you don't have any accounts set up in Salesforce, you see an error. Or let's say you set up a group detail page, but your new site doesn't have any groups. Once again, you see an error.

Any gotchas?

The Customer Service template uses topics to organize content in a site. To see topic detail pages, first set up Navigational Topics in Site Management.

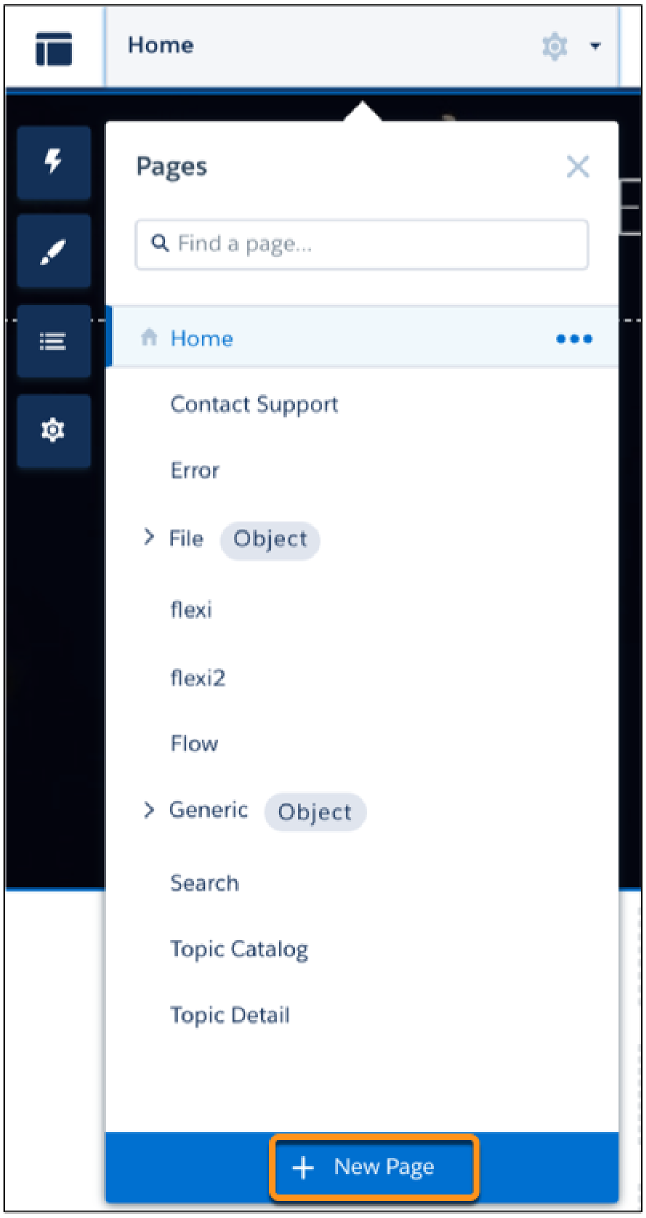
The following default pages in the Customer Service template can show this error. Here are some tips on how to fix it.

- Article Detail: Create at least one Salesforce Knowledge article in your org.
- Topic Detail: Create a Navigational Topic.
- Question Detail: Create a Navigational Topic. Use the Ask a Question button to create a question.
- Feed Detail: Use the Post Publisher or Ask a Question button to create a post or question.
- Group Detail: Create a group in the site.

Create Custom Pages with Experience Builder

Create custom pages to extend your Experience Builder template. Add custom record detail, list, and related list pages to get the most from your Salesforce data.

1. In Experience Builder, open the Pages menu on the top toolbar.
2. Click **New Page** at the bottom of the Pages menu.



3. Select the page type:

Standard Page
A standard page based on a blank layout or a preconfigured page (if available).

EDITIONS

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

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If you don't have preconfigured pages, choose a blank layout, or build your own using a flexible layout on page 544. Alternatively, if you do have preconfigured pages (because you've exported or imported custom pages), choose one to customize or click **New Blank Page** to select a blank layout.

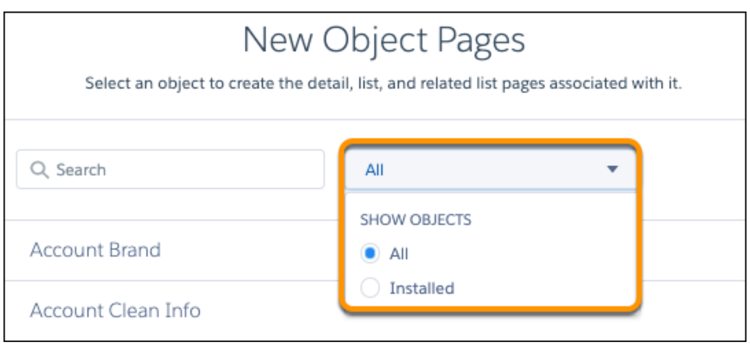
Click **Next**, give the page a name, specify the static portion of the page's URL, and provide an API Name (optional).

> Note: You can use the unique API Name as the `name` attribute in the `comm__namedPage` page reference for the lightning-navigation API.
>
> The API Name can contain only underscores and alphanumeric characters. It must be unique, begin with a letter and end with an alphanumeric character.
>
> For existing pages, or if you leave the field blank, an API Name is generated automatically.
>
> Packaging API names isn't currently supported. Sites created from an exported template could have a different API name than the original site. The `pageName` attribute is now deprecated.
>
> The following named pages can use the API Name in `lightning-navigation`.
>
> - Home
> - Account Management
> - Contact Support
> - Error
> - Login
> - My Account
> - Top Articles
> - Topic Catalog
> - Custom pages

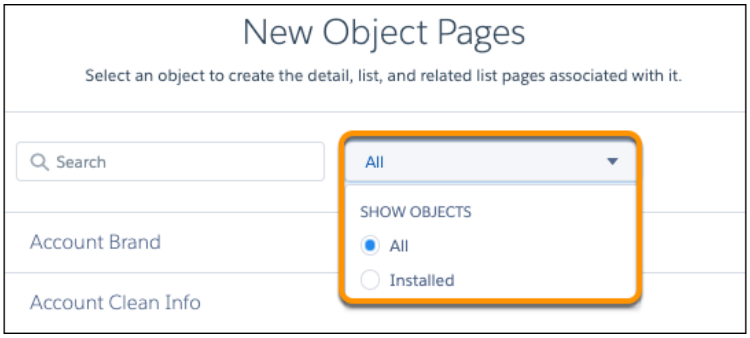
Object Pages

A detail, a list, and a related list page associated with one of your Salesforce objects.

Select the object that you want to associate with the page. You can view all existing object pages in your site or installed object pages. Installed object pages are pages that were exported from or imported into your org.



Add an object page from all existing object pages in your site (1), or add an installed object page (2). Installed object pages are exported and made available across all communities in your org.

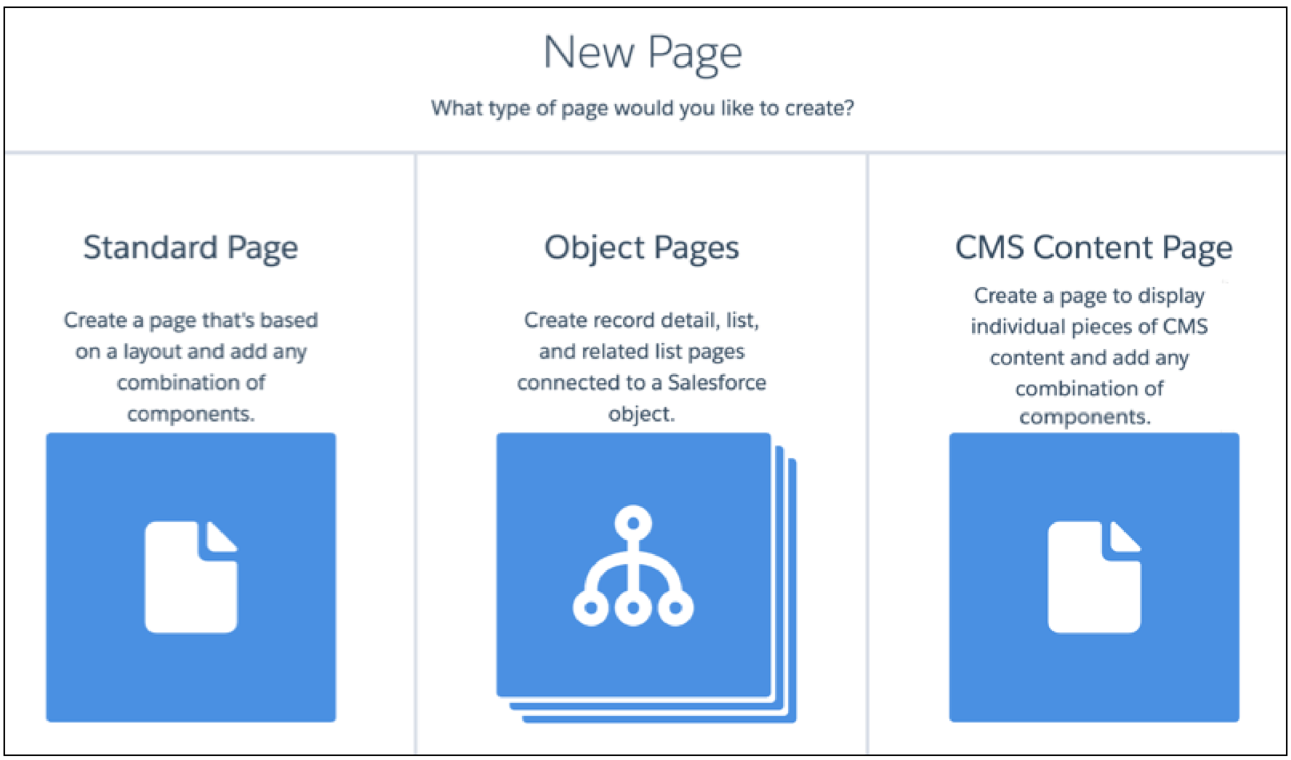


CMS Content Page

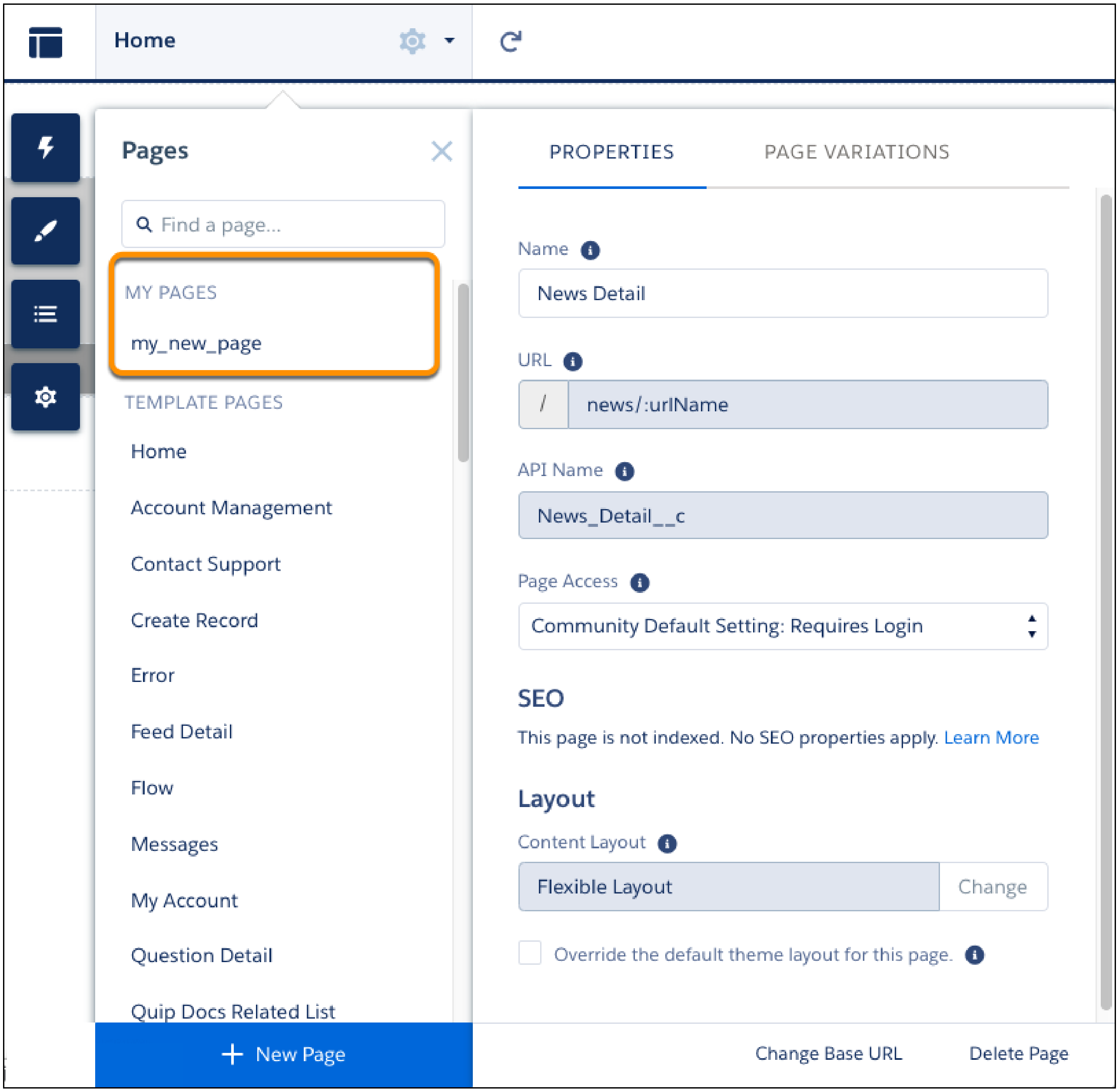
A detail page for a custom content type supporting Salesforce CMS.

Select the content type that you want to support. Click **Next**.

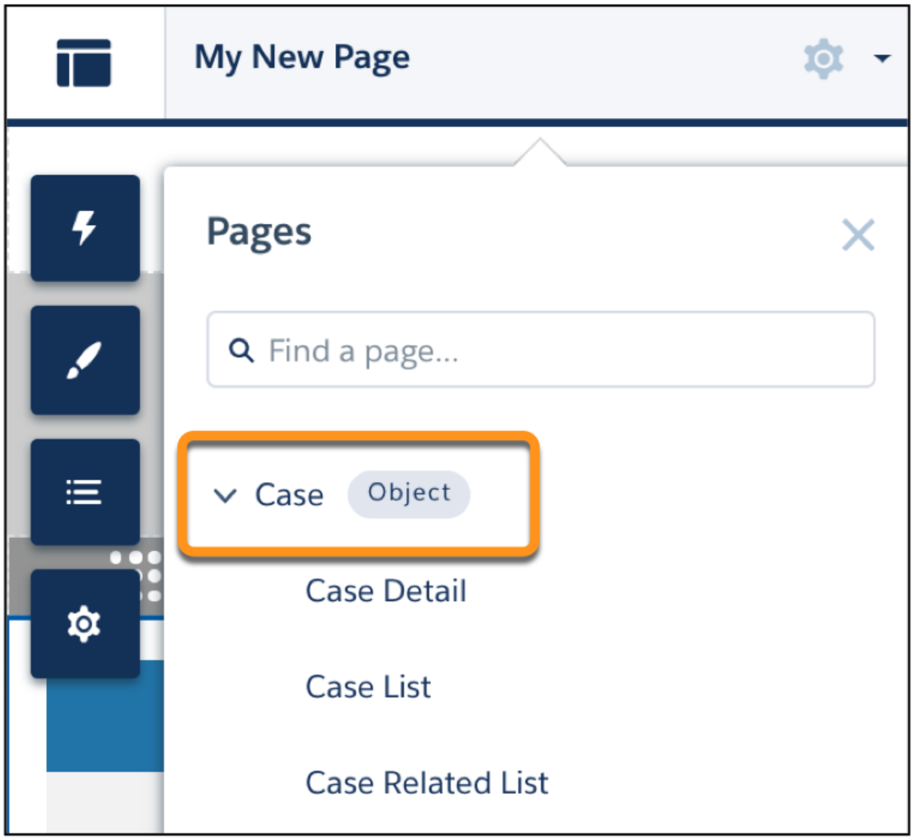
Note: CMS content pages use flexible layouts.



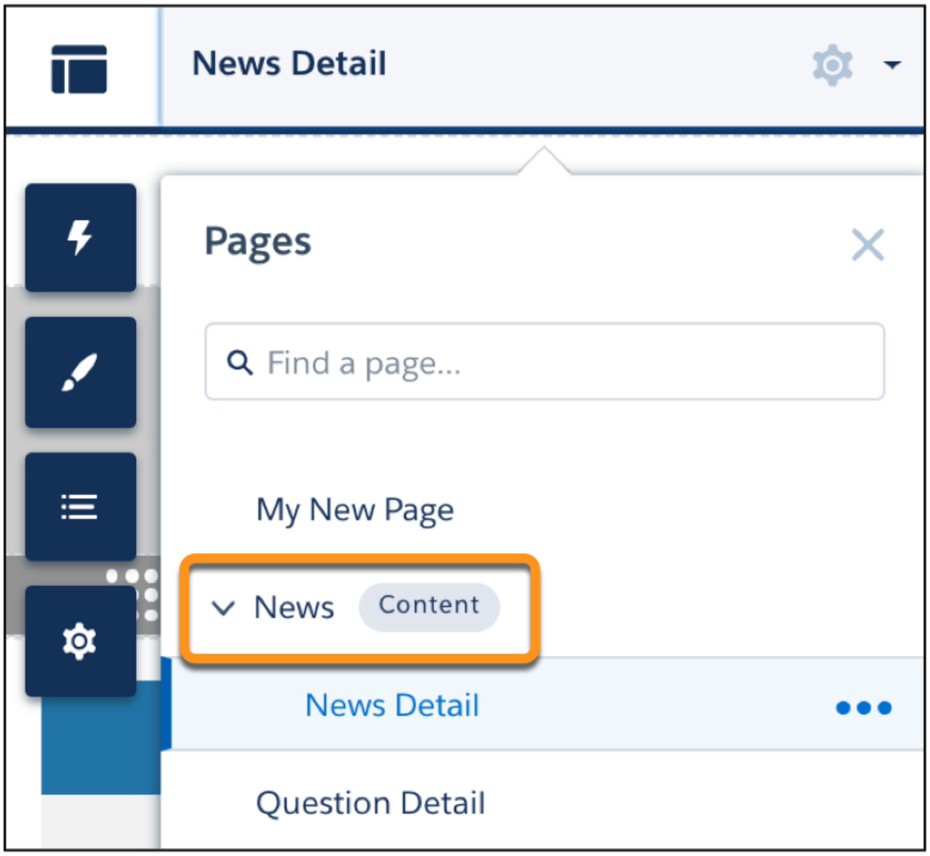
Object and Content pages are grouped to separate them from other types of pages, like custom standard pages.



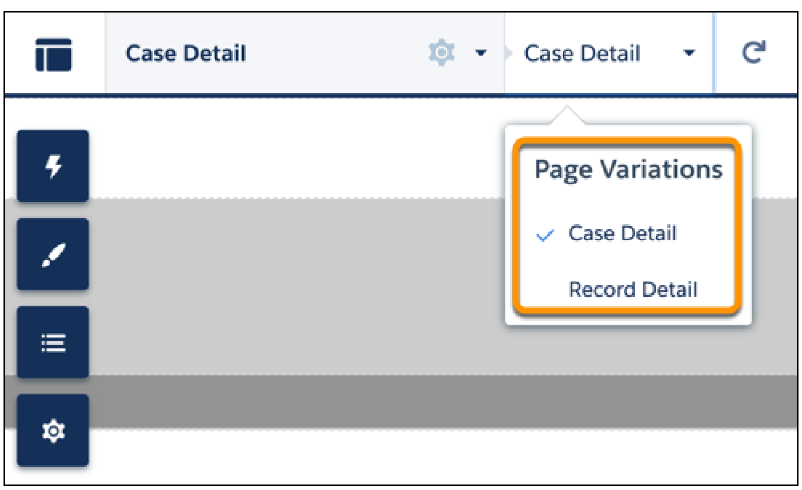
Custom object pages are grouped with an **Object** label.



Custom content type detail pages are grouped with a **Content** label.



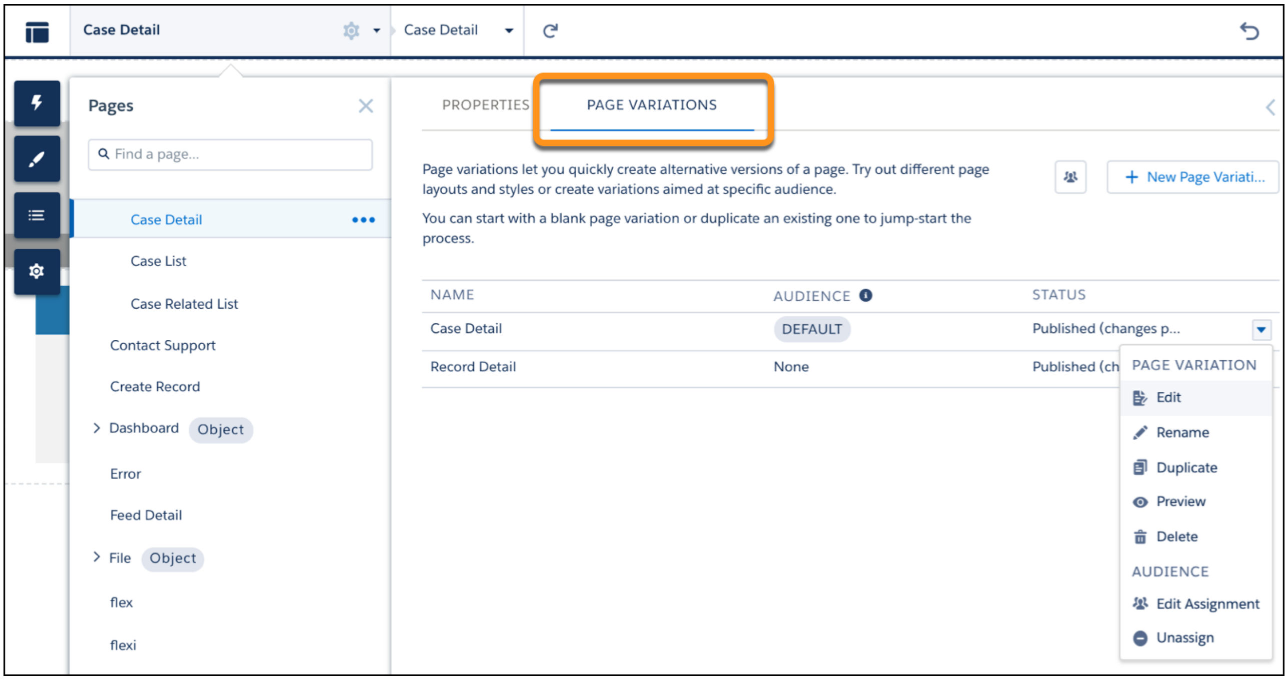
4. Select a standard page to open it. Use the page variations tab to select and open an object page.



5. Add and configure page components.
6. Preview and publish your site.

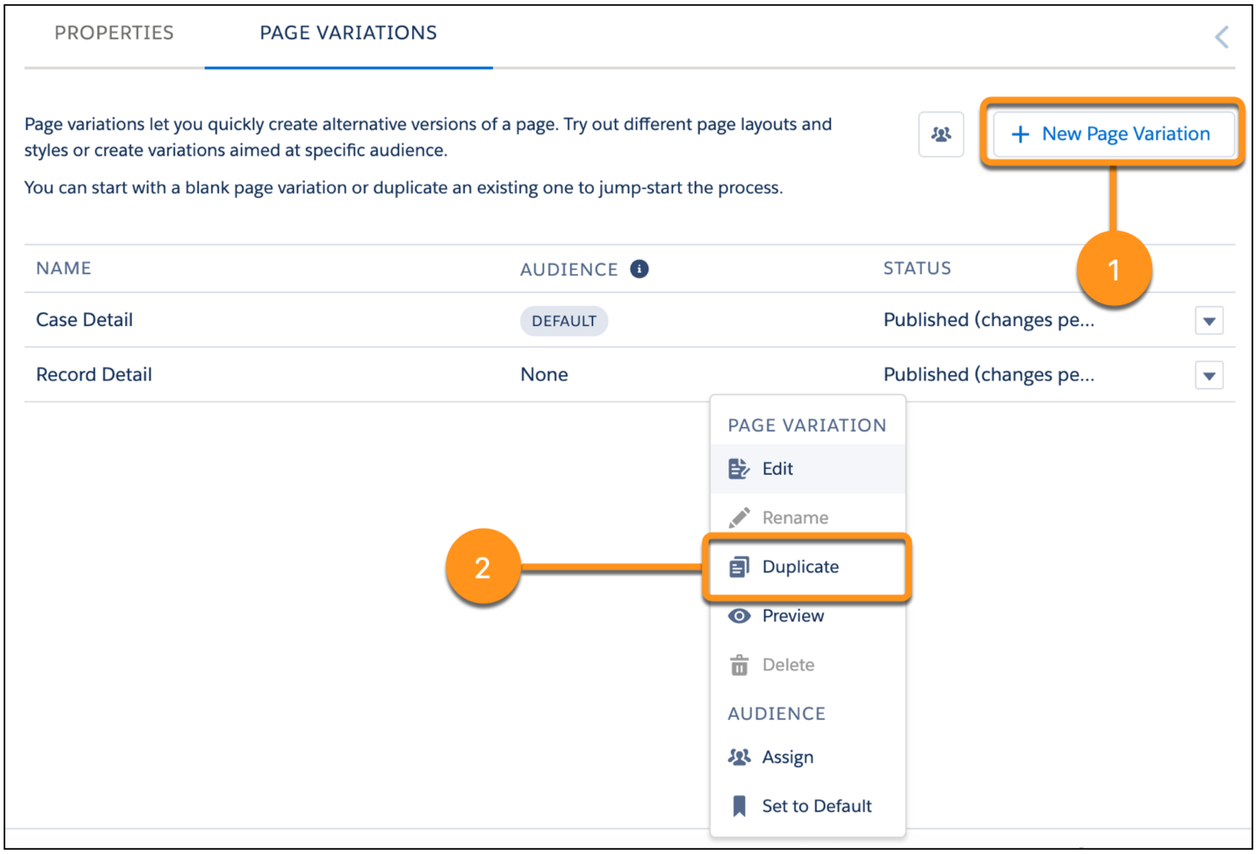
Tip:

- Click ••• from the Page Menu to access Page Properties. Quickly create alternative versions of the page in the Page Variations Tab. For example, you could create three different Question Detail pages to test out various layouts or styles, or to assign them to different audiences.



To create a page variation, click **New Page Variation** in the Page Variations tab (1).

To duplicate a page variation click > **Duplicate** (2). A copy of the page variation appears in the page variation list.



Note: If an audience doesn't have an assigned page variation and the default page variation for the object is deleted, users see a generic record layout when they try to access the record. Generic record layouts can include record detail, record list, and record-related list pages.

- Use the Navigation Menu component to create custom navigation nodes for new pages.

IN THIS SECTION:

Create a Flexible Layout

Build highly customized pages using flexible layouts. Create and resize columns within each section, then add and stack sections to build out the page. Bring it all to life using background images and color.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

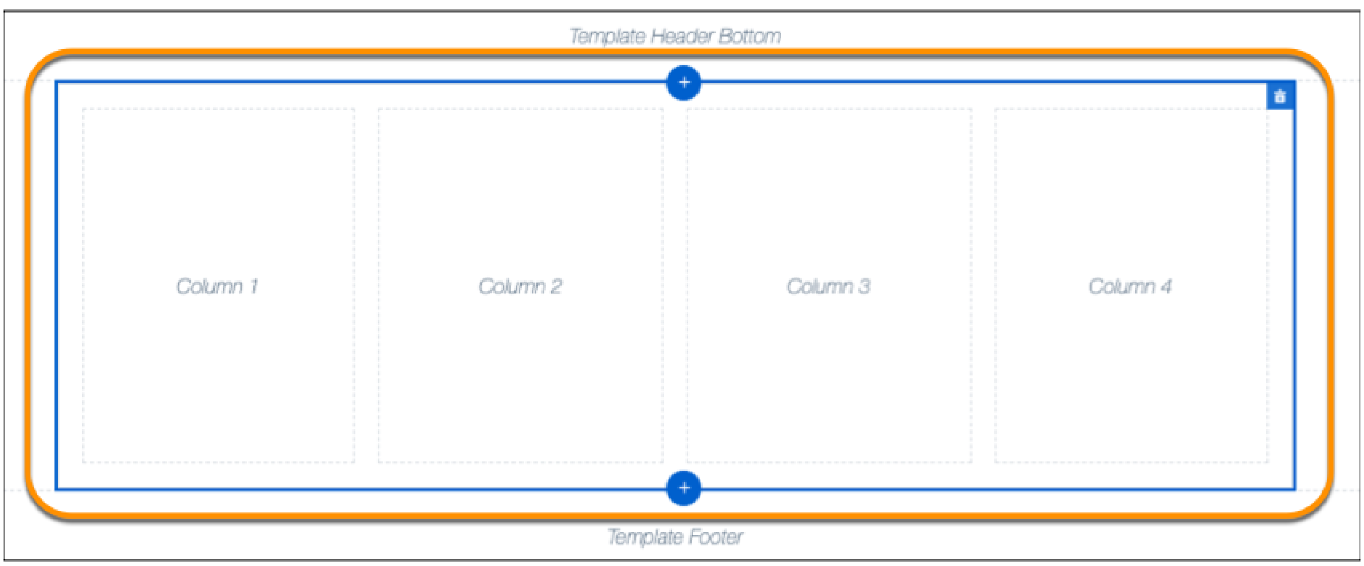
To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences
- OR
- Be a member of the site AND an experience admin, publisher, or builder in that site

1. Create a custom page using a flexible layout.
   - To use a flexible layout with an existing page, create a page variation.
   - You can make the page span edge to edge, giving you full-screen-width sections using the Set Max Page Width setting. First, create a theme layout from **Settings** > **Theme** > **Configure**. Then, in Edit Properties, deselect **Set Max Page Width**. Now you can create a page from this theme layout with sections that span the width of the screen.
   - When you select a flexible layout for your page, you can't change the layout type. The flexible layout lets you customize your page layout to suit your content needs.

2. Build out your sections.

   A section consists of a row on your page and all of its content. Example section:



Add a Section

To add a section above or below the current section, click .

Delete a Section

To delete a section, click .

Note: Deleting a section also deletes all of its content. Pages must include at least one section. To delete the only section, create another section and try again.

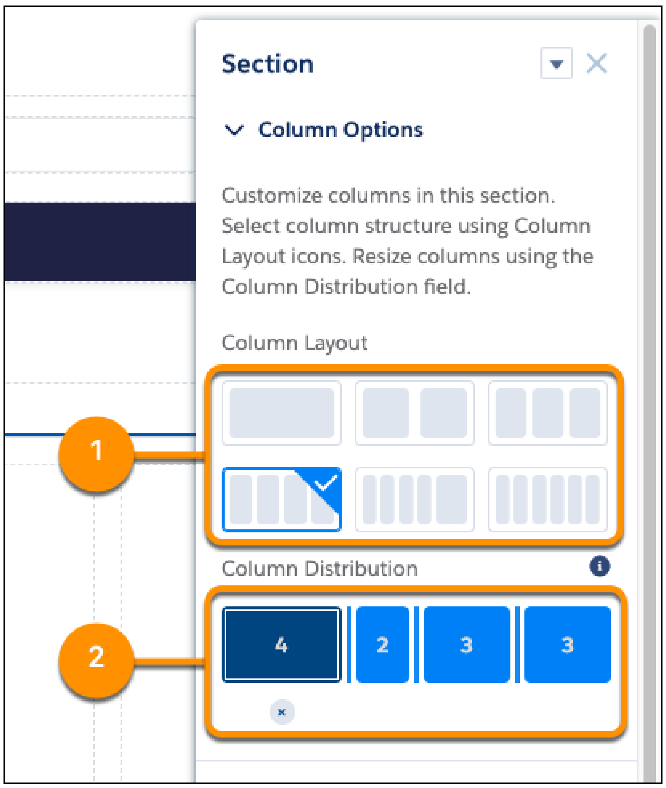
Reorder Sections

To reorder sections, drag the section to place it where you want it.

3. To customize a section, select it.

   Use Column Options to add, remove, and resize columns in this section.

   - To customize the column structure in this section, select a column layout icon **(1)**.
   - In the Column Distribution field **(2)**, use the handles between columns to resize them. The columns snap to a 12-column grid. The number in each column represents the grid units the column uses out of 12. So, to get two columns of equal width, you give each a value of 6. A section can have up to six columns.
   - To delete a selected column, click the beneath it. Deleting a column also deletes all of its content.



Use Section Style to add some panache, like background images and color.

Color

Sets the section's background color. Click the color circle and use the color picker to select a color, or enter a specific hexadecimal code in the text box.

Image

Adds a background image to the section. Upload an image or select one from your org's asset library. Then, select the Image Layout and Image Position in the section.

Image Overlay Color

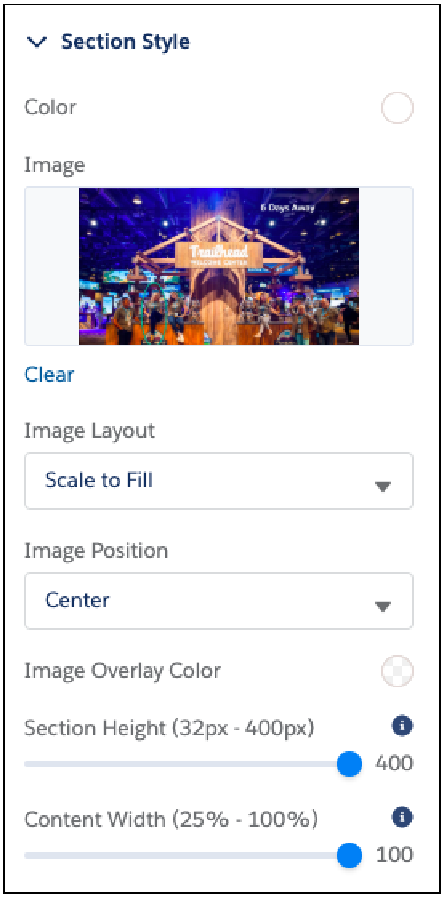
Adds an overlay color to the section. To select a color, click the color swatch or enter a specific hexadecimal code in the text box.

Section Height

Use the slider to set the minimum section height in pixels. Section adjusts automatically when content is taller. Minimum doesn't apply to phones or tablets in portrait mode.

Content Width

Use the slider to set the width of content as a percentage of the full width of the section. This setting doesn't apply to phones or tablets in portrait mode.



SEE ALSO:

Create Custom Pages with Experience Builder

Change the Theme Layout of Your Experience Cloud Site’s Pages

Delete a Page in Experience Builder

Remove a site page or page variation that you no longer need by deleting it from the Page Action menu.

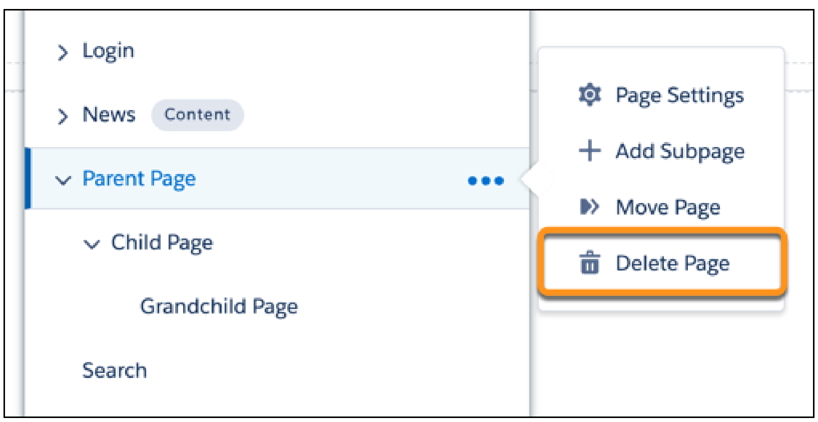
Before you delete a page from your site, review Considerations for Page Actions in Experience Builder. Keep in mind that you can't delete:

- The default pages and objects that come with the template
- A page's default page variation
- A parent page without deleting its subpages
- A custom object page without deleting its related object pages (detail, list, and related list)

To delete a page or page variation:

1. In Experience Builder, open the Pages menu.
2. To access the Page Actions menu, click .
3. To delete a page, click **Delete Page**.

   Deleting a page also deletes the subpages nested under it. For example, when you delete Parent Page, Child Page and Grandchild Page are also deleted:

   To delete a subpage page in the page hierarchy, click next to the specific page you want to delete.

4. To delete page variations (if available), open the Page Actions menu and click **Page Settings**.
5. Open the Page Variations tab.
6. Click the dropdown next to the page variation that you want to delete, then click **Delete**.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To customize an Experience Cloud site:

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  OR

- Be a member of the site AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

Add Markup to the Page `<head>` to Customize Your Experience Builder Site

Add custom analytics, improve your SEO results, and more by adding custom markup to the page `<head>` in Experience Builder. For example, you can include SEO meta tags that are visible only to search engines, add a *favicon*, or add custom code for Adobe Analytics and Google Tag Manager.

Tip: Google Analytics is supported out-of-the box by Salesforce, and doesn't require the following steps. However, before using Google Analytics, you must configure it for your site.

For security purposes, we restrict the tags, attributes, and values allowed in the `head` markup of your pages.

Allowed Tags	Allowed Attributes
<base>	href, target
<link>	as, charset, crossorigin, disabled, href, hreflang, id, import, integrity, media, rel,[1] relList, rev, sheet, sizes, target, title, type [1] For rel, allowed values are alternate, apple-touch-icon, apple-touch-icon-precomposed, apple-touch-startup-image, author, bookmark, canonical, external, help, icon, license, manifest, mask-icon, next, nofollow, noopener, noreferrer, pingback, prefetch, preload, prev, search, shortcut icon, stylesheet, and tag.
<meta>	charset, content, http-equiv,[2] name, property, scheme [2] For http-equiv, allowed values are cleartype, content-type, content-language, and default-style. Note: The attribute `http-equiv="X-UA-Compatible"` is only supported in combination with `content="IE=Edge"`.
<noscript>	Within <noscript> only the following elements are supported: <img>, <a><img>, <iframe>
<script>	Use for custom content
<style>	type, media, nonce, title
<title>	None allowed

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To customize an Experience Cloud site:

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  OR

- Be a member of the site AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

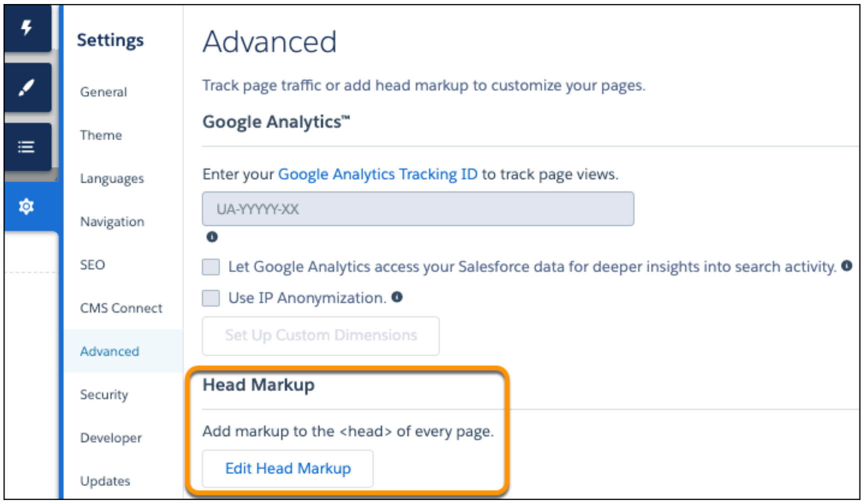
  OR

- Be a member of the site AND an experience admin or publisher in that site

Note: If the content in your `<head>` tag is invalid, you can't save your work. If you entered unsupported code, hover over to see details on the issues.

Existing `head` elements that contain invalid markup are stripped from the page before it's rendered. To get the `head` working again, use Experience Builder to remove the unsupported tags.

1. In Experience Builder, click ⚙ > **Advanced**.

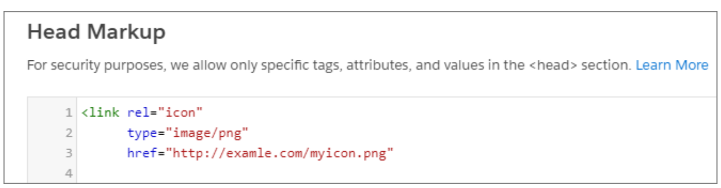


2. Click **Edit Head Markup**.
3. Enter the markup and save your changes.
   When you add custom markup, the code is added to the `head` of every page in your site, including login pages.
4. Before deploying the site to your production org, test the `head` markup in your sandbox or DE orgs.

   Depending on the CSP security level of your site, head markup sometimes doesn't work as expected. See Select the Relaxed CSP security level.

   Alternatively, conflicts can arise with Lightning Locker. See Resolve Lightning Locker Conflicts in Experience Builder in the *Experience Cloud Developer Guide*.

Example: Here we added HTML to include a favicon on our site's pages.



SEE ALSO:

Experience Cloud Developer Guide: Example: Adobe Analytics and Lightning Locker in Experience Builder Sites

Personalization Using Audience Targeting in Experience Builder Sites

Audiences are sets of criteria used to define user segments. Use them to keep your users engaged by offering them personalized, relevant content in a customized site.

Note: Audiences vary what users see, but aren't considered a security check. Use the standard security methods to make sure that sensitive data is safe.

Let's say that a company offers a product that is different in different regions. Rather than creating different Experience Builder sites, you could simply create different experiences of the same site. Using Experience Builder, apply sets of criteria to pages, components, branding sets, CMS collections, navigation menus, or tile menus. What users see varies depending on their location. The criteria include:

- Profile
- Location
- Domain
- User Object
- Record-Based Criteria
- Permission
- Audience

Profile lets you choose users who fit a specific profile as you've defined it in your org. Location, determined by the users' IP addresses, selects users who are in specific area, like a state or country. Domain chooses users based on how they come into your site. For example, coffee.awsimporters.com and tea.awsimporters.com. Record-based criteria selects users who match a particular record type, like group.

User object is a bit different and offers the ability to use CRM fields as audience criteria. This option gives you the power to use customer information to create specific criteria, such as which department a user works in.

Record-based criteria uses specific record objects to create non-user criteria. For example, you can display different theme layouts when someone is looking at a coffee machine or a box of tea, or different pages for high-value and low-value opportunities. The objects you can use to create record-based criteria are:

- Account
- Asset
- Campaign
- Case
- Contact
- Contract
- Lead
- Opportunity
- Product2
- ProductCategory
- Quote
- Custom objects
- Any object, except Knowledge, with at least one record type (only some fields available)

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To create an Experience Cloud site:

- Create and Set Up Experiences AND View Setup and Configuration

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

Audience criteria is different than the other criteria types. You can use an audience as criteria in another audience to easily reuse sets of criteria.

Apply the audience you create to entire pages, individual components, branding sets, CMS collections, navigation menus, or tile menus for different effects. Applying audiences to page variations means that users see, for example, different home pages. Applying audiences to a component means that everyone sees the same page, but what's on the page can be different. Applying audiences to branding sets lets you display the same content but with entirely different looks and feels. Finally, applying audiences to CMS collections, navigation menus, and tile menus components lets all users see the components, but different audiences see different versions.

You can also apply multiple criteria and finely tune your user segment targeting, but most likely some users fit in more than one criteria. To get the target group you want, set the order criteria are applied. Choose which branding set or page takes precedence by dragging and dropping them into the order you want.

One other aspect to consider when using multiple criteria is the effects of layering. For example, you have a California audience assigned to a page. On that page, you assign a component to a company. The effect is that only users who work for that company in California can see the component.

A note about page visibility: Aside from Audiences, you control who sees a page by setting its visibility. After you create the page variations you need in Page Manager, choose from three visibility options. When combined with a page's published status, these options determine whether a page is visible to your users.

Default: All users unless set by audience
When the page is published, it's visible to all valid users, except those users who are part of an audience assigned to a different page variation. Each page must have one default page variation.

Audience
When the page is published, it's visible only to users within the selected audience.

None
Even if the page is published, it's not visible to users.

IN THIS SECTION:

Considerations for Using Audiences
Audiences are a great way to target specific Experience Builder site users with the right content. As you work with audiences, though, there are some things to consider.

Create and Manage Audiences in Experience Builder Sites
Create audiences and apply them to vary what people see when they view your Experience Builder site. Combine audience criteria to further control what is visible to your site users, creating a custom experience.

Target Audiences Using CRM User Fields
Starting with the User criteria, select your way to the CRM user field you want to use to create audience criteria.

Target Audiences Using Record-Based Criteria
Vary what people see on a record detail page using audience criteria based on record fields, such as opportunities or accounts, instead of user fields.

Use Audiences as Criteria to Create Broader Audiences
Consolidate multiple audiences into one audience and avoid re-creating complex sets of criteria. When you use audiences as criteria to create another audience, you can use more criteria to target a particular page variation, component, branding set, and more.

Custom Audience Formulas
With custom formulas, you can create complex, specific audiences by grouping criteria and applying AND and OR statements.

Create Personalized Components

Certain components have audience personalization built into the component itself. Personalization lets you decide what version of a component your user sees, customizing their experience.

Assign Audiences to Components

Assign audiences to Experience Builder components and further refine your audience targeting.

Considerations for Using Audiences

EDITIONS

Available in: **Salesforce Classic** and **Lightning Experience**

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

Audiences are a great way to target specific Experience Builder site users with the right content. As you work with audiences, though, there are some things to consider.

General considerations:

- You can change the priority of your criteria by dragging and dropping them into the order you want.
- Layering audiences can be tricky. For example, if you have a San Francisco audience assigned to a page variation, all your users in San Francisco can see the page. If you add company name criteria to a component on the page, that component is visible only to users in San Francisco who also work for that company. If you assign a California audience to the component, no one outside of San Francisco sees it because the entire page is already assigned to the more specific San Francisco audience.
- You can have up to 1,500 audiences.
- Use the % wildcard to help with searches.
- You can't assign audiences to the components in the template header and footer sections.
- Use PREVIEW AS to see your site with applied audiences before publishing. To open PREVIEW AS, click **Preview**, and then click the eye icon.
- Custom object records aren't automatically available in partial copy sandboxes and can cause issues with audiences that reference them. To avoid this situation, do one of the following:
  - Include the custom object data in your sandbox.
  - Temporarily remove or disable the criteria that reference the custom object.
  - Edit records that include the custom object and delete any data in the custom object lookup field.
- If you're not seeing what you expect, such as seeing default variations instead of the personalized ones, try again a bit later.

Performance considerations:

- Keep your location criteria broad. If the location is unlikely to have much traffic, try using a larger geographic area. For example, instead of a city, use a state or even a country.
- To increase the traffic to your page, combine audiences. Instead of having multiple audiences that differ only by the city, combine them into one and add each city to the location criteria.

Location criteria considerations:

- Location is the user's IP location, which can be in a neighboring area.
- The location permission isn't on by default in Developer Edition orgs. Contact Salesforce if you want to use this feature in that edition.
- Use of Google API isn't permitted in some countries. Location criteria don't work for those areas.
- Custom location fields aren't available for use as audience criteria.

Domain criteria considerations:

- Available domains are created in Salesforce Setup and associated with a site through a custom URL.

- Domain criteria aren't available in Developer Edition orgs.

Record-based criteria considerations:

- Record-based criteria uses record fields, like opportunity amount, not user fields, like role.
- You can't assign record-based criteria to a component or branding set.

Audience criteria considerations:

- You can't use an audience that contains record-based criteria as audience criteria.
- You can't use an audience as criteria for itself.
- An audience used as criteria can have up to 10 criteria.
- Audience criteria can be only one level deep. For example, say you have three audiences: a California User audience, a Gold Partner audience, and a Dog Owner audience. You can use Dog Owner as criteria for Gold Partner. However, you can't then use Gold Partner as criteria for California User because Gold Partner already has audience criteria.

Create and Manage Audiences in Experience Builder Sites

Create audiences and apply them to vary what people see when they view your Experience Builder site. Combine audience criteria to further control what is visible to your site users, creating a custom experience.

To assign audience criteria to a page variation. See Personalization Using Audience Targeting in Experience Builder Sites for details and considerations when using audience criteria.

1. In Page Manager, select the page you want to edit.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

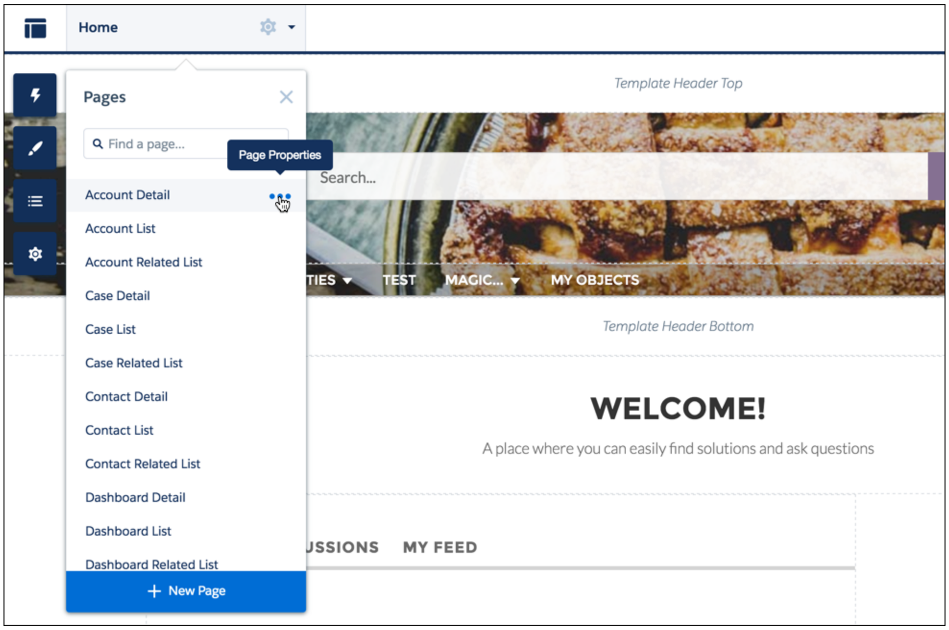
- Be a member of the site AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site



2. To bring up the ellipsis, hover over the page name.
3. To bring up the page options, click the ellipsis.
4. Open the Page Variations tab.
5. Click the dropdown next to the page variation you want to work with and then click **Edit Assignment**.
6. Click an existing audience or click **New Audience**.
7. Select the criteria that you want for your audience.
8. To update the visibility settings of:
   - An unpublished page, click **Save**. The visibility changes don't go live until you publish your site.
   - A published page variation, click **Publish Visibility Changes**. The visibility changes go live immediately, but any other pending changes must be published separately.

To set the visibility of a page variation to Default, click > **Set to Default**.

To set the visibility of a page variation to None, remove any assigned profiles or set the visibility of another variation to Default, as appropriate.

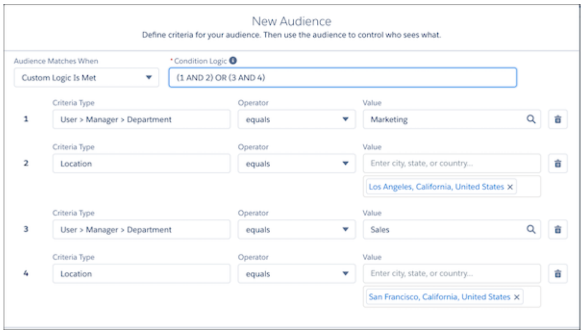
Target Audiences Using CRM User Fields

Starting with the User criteria, select your way to the CRM user field you want to use to create audience criteria.

By selecting the user fields on CRM objects, you can create highly targeted audience criteria. Say that your organization has an employee site. You could set it up so that different pages appear to different departments and even roles within those departments.

EDITIONS

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.



Note: You can select the following types of fields.

- Text
- Picklist
- Multi-select picklist
- Number
- Checkbox
- Currency
- Date (but not Date/Time)

Target Audiences Using Record-Based Criteria

Vary what people see on a record detail page using audience criteria based on record fields, such as opportunities or accounts, instead of user fields.

Generally, audiences are used to vary what is shown based on characteristics of the user. For example, you can show different home pages to a reseller partner and a repair partner. Record-based criteria allows you to vary what is shown based on the characteristics of the record being viewed. This criteria allows you to show, say, different record detail pages for an escalated case and a low-priority case. User-based and record-based criteria can even be combined. You can show a different opportunity record detail page if the value is greater than $1 million and the viewer has a role of sales vice president or higher.

You can create record-based criteria using these objects:

- Account
- Asset
- Campaign
- Case
- Contact
- Contract
- Lead
- Opportunity
- Product2
- ProductCategory
- Quote
- Custom Objects
- Any object with at least one record type (only some fields available)

1. In Page Manager, select the record detail page you want to apply audiences to.
2. To bring up the ellipsis, hover over the page name.
3. To bring up the page options, click the ellipsis.
4. Open the Page Variations tab.
5. Click the dropdown next to the page variation you want to work with and then click **Edit Assignment**.
6. Click an existing audience or click **New Audience**.
   a. For new audiences, select the record criteria that you want to apply.
   b. Adjust the operator and the value.
7. Save.

EDITIONS

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

USER PERMISSIONS

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  OR

- Be a member of the site AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

Use Audiences as Criteria to Create Broader Audiences

Consolidate multiple audiences into one audience and avoid re-creating complex sets of criteria. When you use audiences as criteria to create another audience, you can use more criteria to target a particular page variation, component, branding set, and more.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

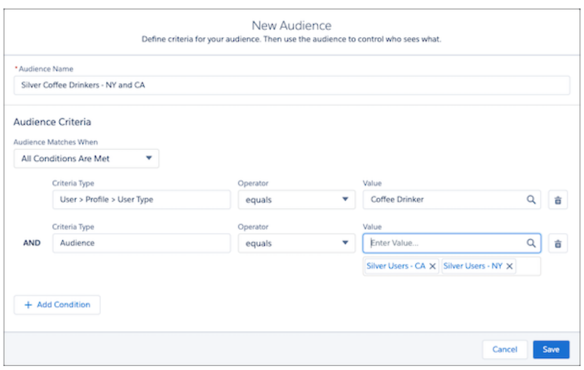
Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Let's say a beverage company has a site that caters to coffee drinkers and tea drinkers. To target specific users, the company created multiple audiences:

- Coffee Drinkers
- Tea Drinkers
- Gold Users
- Silver Users
- Silver Users - NY
- Silver Users - CA

Now the company wants to market a sale that gives a discount to coffee drinkers in California and New York who are silver users. But the company doesn't want to re-create all the detailed criteria for silver users and location-based users. Instead, the company can combine audiences to create an audience just for this sale and apply the new audience to a page variation with the sale content.

The new audience, Silver Coffee Drinkers NY and CA, combines a user criteria type—coffee drinkers—with two audience criteria types: silver users in New York and California.



Then the company applies this broader audience to the page variation for the sale. The only customers who can see this page variation are silver-user coffee drinkers who are based in California or New York.

Note: You can't use an audience as criteria if it contains record-based criteria.

SEE ALSO:

Create and Manage Audiences in Experience Builder Sites

Create Custom Pages with Experience Builder

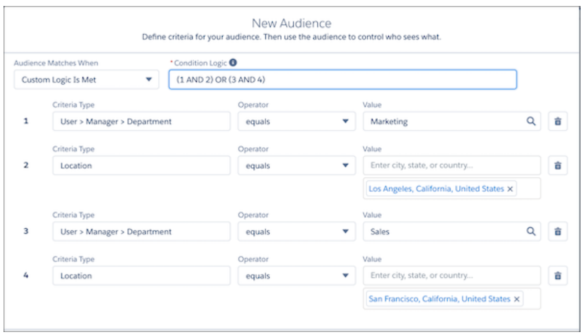
Custom Audience Formulas

Custom Audience Formulas

With custom formulas, you can create complex, specific audiences by grouping criteria and applying AND and OR statements.

Grouping criteria and applying operators gives you much more flexibility when creating an audience. Say, for example, you want to target content to both marketing managers based in the Los Angeles area and to the sales managers based in San Francisco. You can do this in one audience by creating user and location criteria, grouping them using parentheses, and applying the AND and OR operators.

Let's take a closer look. In this case, you select Custom Logic Is Met, and add criteria for Los Angeles, San Francisco, Sales, and Marketing. Then, in the Condition Logic, you group the criteria using parentheses, pairing the role and location with an AND operator and separating the groups with OR.



EDITIONS

Available in: **Essentials**, **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

Create Personalized Components

Certain components have audience personalization built into the component itself. Personalization lets you decide what version of a component your user sees, customizing their experience.

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

When you personalize a component, you assign audiences to the different versions of that component. What a user sees depends on what audience they fit in.

1. In Experience Builder, click the component you wish to personalize. Personalization is available for navigation menu, tile menu, and CMS collection components.
2. To open the personalization window, click **Personalize**.
3. Select the component variation you’d like to display and the audience you want to display it to. Click **Add Assignment** if you want to create more than one personalization.
4. Click **Done**.

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

Assign Audiences to Components

Assign audiences to Experience Builder components and further refine your audience targeting.

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

USER PERMISSIONS

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  OR

- Be a member of the site AND an experience admin, publisher, or builder in that site

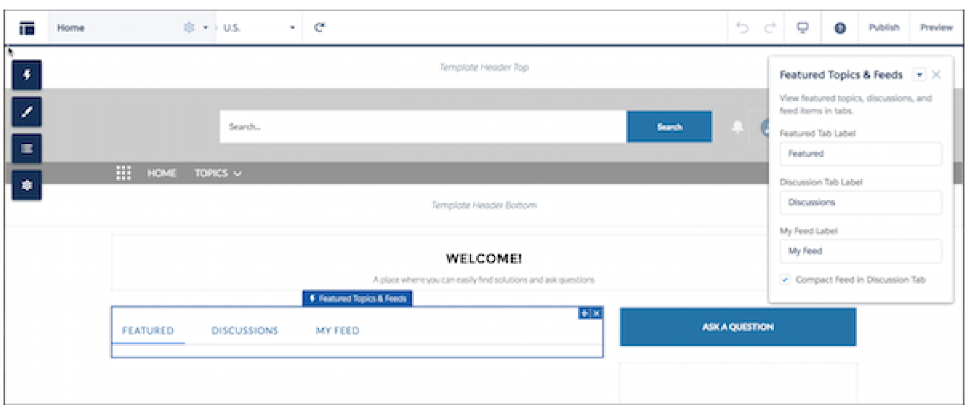
To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

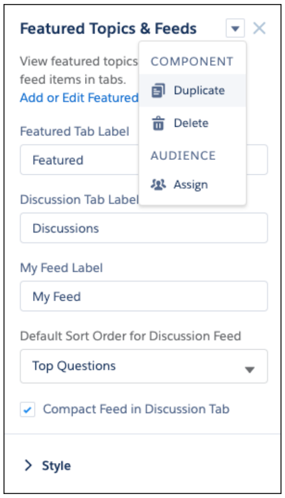
  OR

- Be a member of the site AND an experience admin or publisher in that site

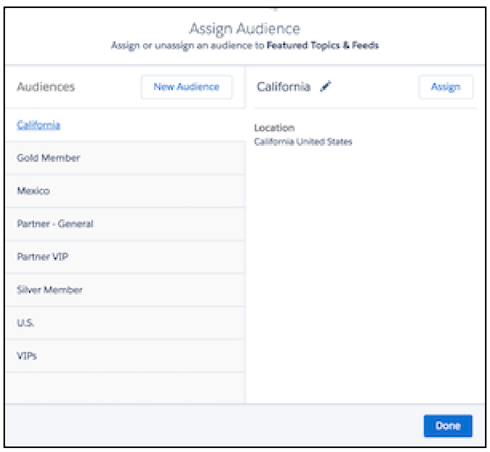
For example, you have a page that's assigned to customers in the U.S., but you want different topics and feeds to appear for customers in California. Go to the page in Experience Builder, and click the component. The blue outline indicates that it doesn't have an audience assigned to it yet.



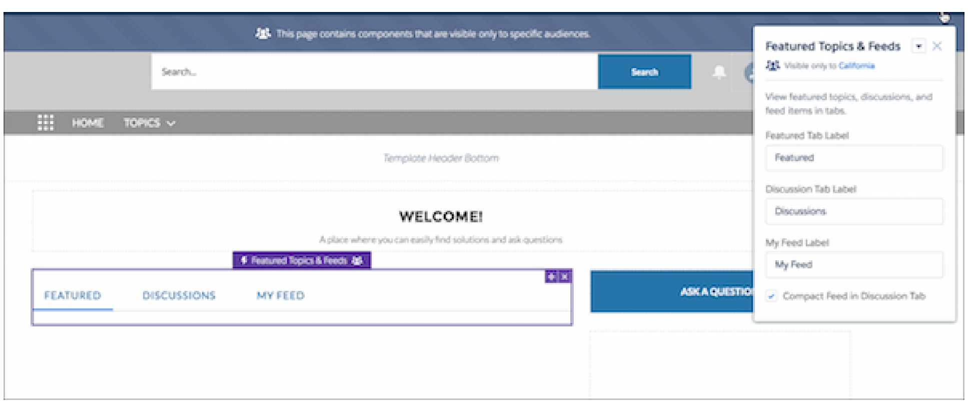
Click the arrow next to the component name, and select **Assign**.



Choose California from the list of audiences, click **Assign**, and then click **Done**.



Notice that the header component's outline is now purple and the audience icon appears next to the name to indicate that it has an assigned audience. A note at the top of the page lets you know that at least one component has a specific audience. The component details list the audience.



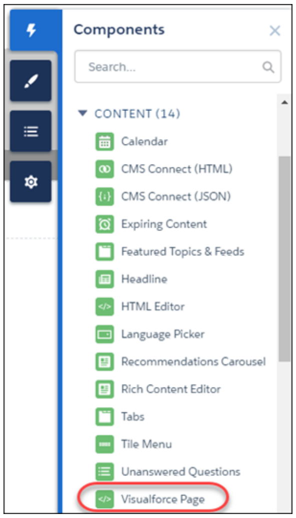
Note: A couple things to keep in mind:

- You can't assign record-based criteria to a component.
- You can't assign audiences to the components in the template header and footer sections.

Use Visualforce in Experience Builder Sites

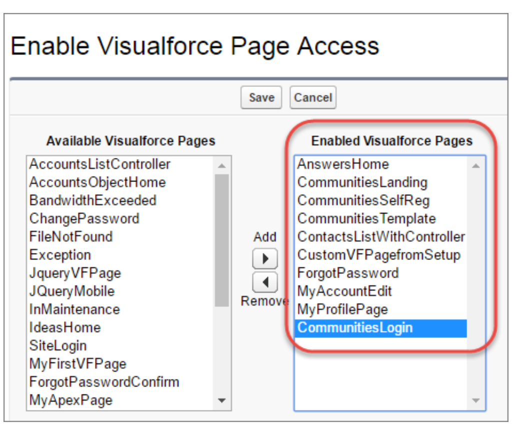
If you've created Visualforce pages, actions, buttons, links, and canvas apps for your Salesforce Tabs + Visualforce template-based sites, they can be used in Experience Builder sites.

Note: To include a Visualforce page on a site page, use the Visualforce Page component in Experience Builder.



For example, say that you have the Salesforce CPQ app installed in your org. You can create a quote detail page and use the Visualforce Page component to display the quote line editor or other pages. If you have configured actions, buttons, and links, associated with standard or custom objects, they work in sites as well. And canvas app overlays let you host third-party applications in your site.

1. Give Visualforce page access to users by profile.
   a. From Setup, enter `Profiles` in the Quick Find box, then select Profiles.
   b. Click the name of the profile you want to modify.
   c. On the Profile page, click **Enabled Visualforce Page Access**.
   d. In the **Enabled Visualforce Page Access** section of the Profile page, click **Edit**.
   e. In the Available Visualforce Pages list, select the Visualforce pages that you want to make available to this profile and then click **Add**.



EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

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  OR

- Be a member of the site AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

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  OR

- Be a member of the site AND an experience admin or publisher in that site

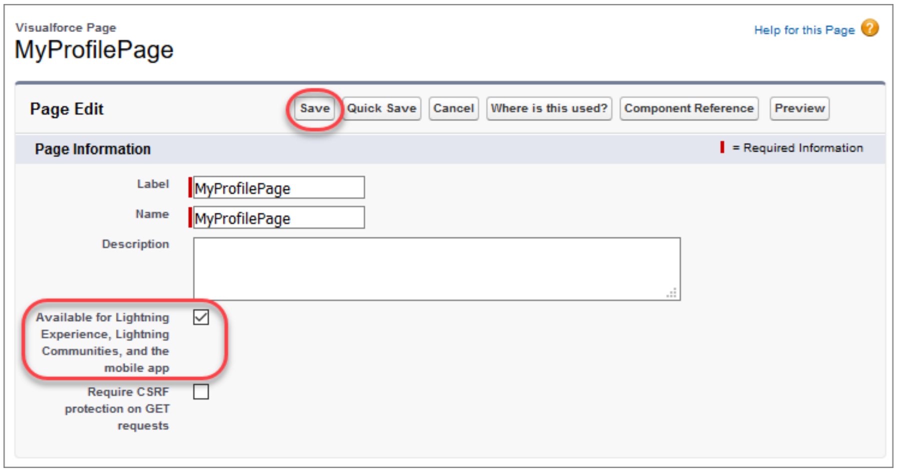
f. Click **Save**.

2. Make the Visualforce page available for your site.

a. From Setup, enter `Visualforce Pages` in the Quick Find box, then select **Visualforce Pages**.

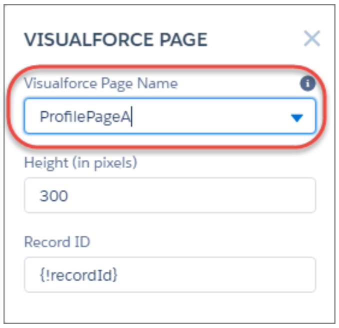
b. Click **Edit** for the page you want to make available for your site.

c. Select **Available for Lightning Experience, Experience Builder sites, and the mobile app** and click **Save**.



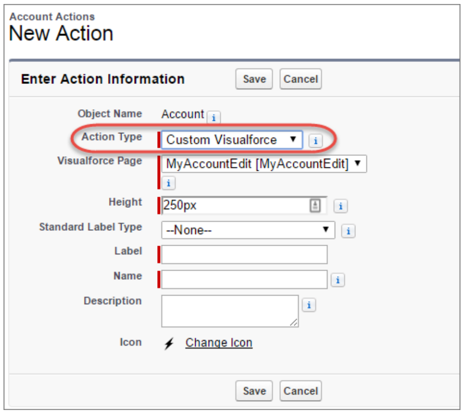
If you want to use the page in an Experience Builder template, make sure **Require CSRF protection on GET requests** isn't selected as it prevents the page from rendering.

Visualforce Page Component—To add a Visualforce page to your Customer Service site, drag the Visualforce Page component from the Components panel to the page. Select the Visualforce page you want to use in the property editor.



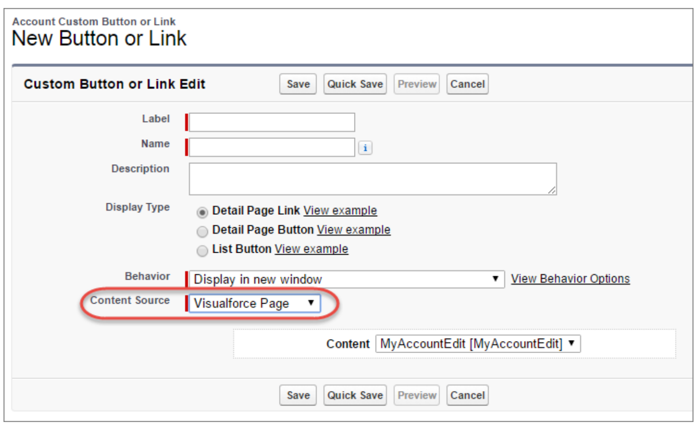
Tip: If the Visualforce page requires the Record ID from an object such as Account, create object pages for Account. Then drag the Visualforce Page component onto the object's detail page. The Record ID field adjusts to the object's ID.

Custom Actions—If you have custom actions with an action type of **Custom Visualforce** associated with a Visualforce page, these actions work in published sites. When users click the action button, the associated Visualforce page displays.



Important: Overrides to standard Visualforce actions such as View, New, Edit, and Delete aren't supported in sites. These buttons on record detail pages don't display in sites.

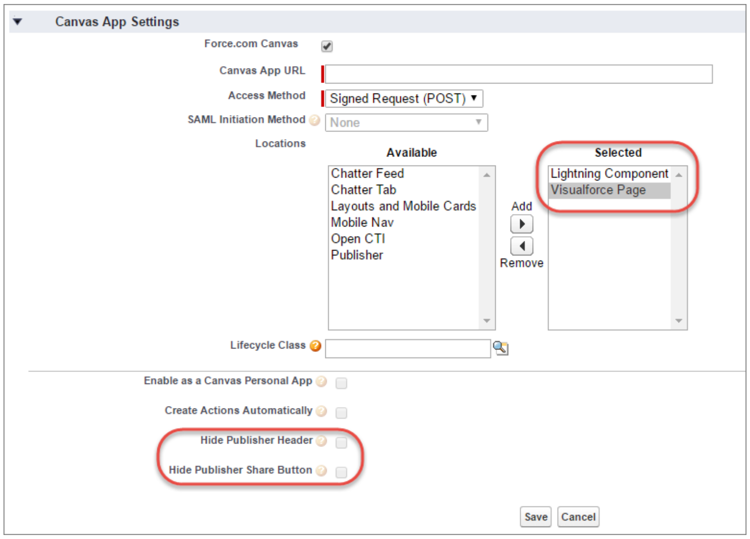
Custom Buttons and Links—If you have custom buttons and links with a content source of Visualforce Page, these buttons and links work in published sites. When users click the button or link, the associated Visualforce page displays.



Note: The Behavior setting for custom buttons and links isn't supported. When users click custom buttons in published sites, the Visualforce page is always displayed in the current window.

Visualforce custom list buttons and custom list buttons with a URL source aren't supported in Experience Builder sites.

Canvas Apps—You can use canvas apps as custom actions to give users access to the functionality of your apps in sites. Configure your canvas app for Lightning Component and Visualforce Page in Canvas App Settings. You can then load the canvas app inside a Visualforce page, Visualforce action, and Lightning components in published sites.



Note: Canvas apps and quick actions aren't supported for guest users. They're supported on sites only for logged in users.

You can opt to hide the publisher header and publisher Share button in Canvas App Settings.

Best Practices for Using Visualforce in Experience Builder Sites

- **Site Branding**—When developing your Visualforce page code, set the `showHeader` attribute to `true`. That way, branding properties you set in **Administration** > **Branding** in Experience Workspaces also apply to the Visualforce page component in your Customer Service site. To modify the default gray background for Visualforce components, change the **Header Background** property on the Branding page.
- **Mobile**—To enable Visualforce pages to display site branding on mobile, set `standardStylesheets=true` or `showHeader=true` in your Visualforce page code.
- **URLs**—If your Visualforce page contains links to other Visualforce pages, ensure that the Visualforce markup includes `http://` or `https://` at the start of the URL. Also, if your page is locked in a frame, use the `target="_top"` attribute to open the page in the full body of the window. For example,

  ```
  <a href="https://yourVFpageURL.com" target="_top" >Name of Visualforce Page</a>
  ```

- **JavaScript Sources**—Use JavaScript sources such as `connection.js`, `apex.js`, `debugshell.js`, and `util.js` in Visualforce pages in either of the following ways:

  `<apex:includeScript value="/soap/ajax/36.0/connection.js"/>` or

  `loadScript("/soap/ajax/36.0/connection.js")`

- **Images**—Hard-coded image URLs in Visualforce pages aren't supported in Experience Builder preview. We recommend that you upload images as static resources as follows:

  ```
  <img alt="{{msg.severity}}" class="msgIcon" src="{!$Resource.spacerImage}"
  title="{{msg.severity}}"/>
  ```

- **Standard Page Layouts**—Visualforce pages embedded in standard page layouts aren't supported in Experience Builder sites.

Add Streams to Your Experience Builder Site

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

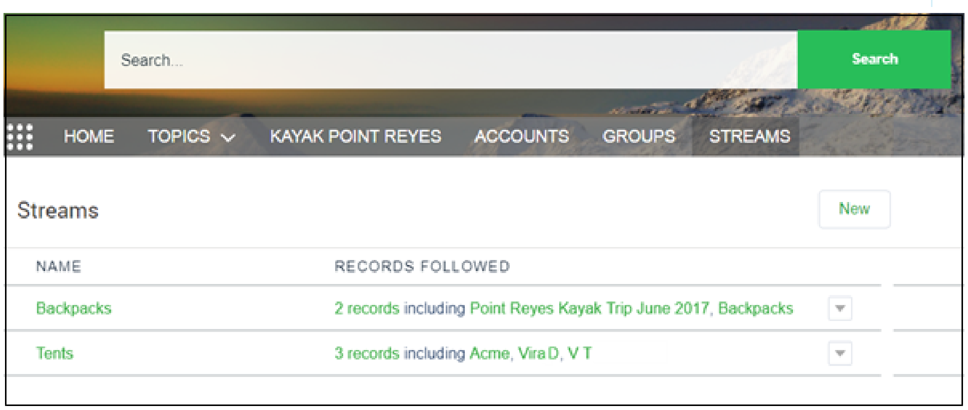
- Be a member of the site AND an experience admin or publisher in that site

Your site users can combine multiple feeds into a stream to create a single point of access to related information. Combine feeds of top contributors or discussions concerning a particular product line. Create a stream that combines feeds from discussions, groups, topics, profiles, and all kinds of objects, like cases, opportunities, and accounts. No more jumping from feed-to-feed to get a sense of what people are saying. Each member can create up to 100 streams.

In the Experience Builder, add the Stream List page to navigation, and you're done.

1. In your site, open Experience Builder.
2. Click the navigation bar, and then click **Navigation Menu**.
3. Click **Add Menu Item**.
4. In the Menu Item panel, enter a name for the Stream List page, for example, *`STREAMS`*.
5. For **Type**, select *`Community Page`*.
6. For **Page**, select *`Stream List`*.
7. Choose whether to make the Stream List page publicly available.
8. Click **Publish**, and then click **Publish** again.
9. In the banner, click **Publish**, and then, in the confirmation dialog, click **Publish** again.

   Site users have access to tools for creating and viewing their own streams.



Share More Salesforce Object Data in Your Site

The Customer Service template allows you to share record data for accounts, cases, contacts, tasks, events, and custom objects with minimal configuration. Record data respects user permissions via licenses, profiles, permission sets, and sharing rules.

Note: This functionality is available in the Winter '16 and later versions of the Customer Service template.

- Create a list of records and link to it.
- Display record details in your site with the standard Record Detail page or create a custom page.

You can also add groups to your community in the same way.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To create an Experience Cloud site:

- Create and Set Up Experiences AND View Setup and Configuration

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

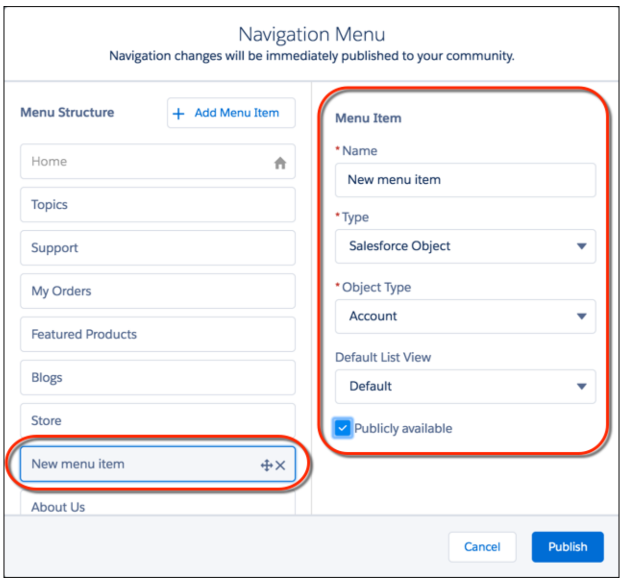
- Be a member of the site AND an experience admin or publisher in that site

Share a List of Records in Your Site

Create record list views for accounts, cases, contacts, and custom objects, and link to them from the Customer Service template navigation menu. Use a standard or custom page layout to display the list of records.

Note: This functionality is available in the Winter '16 and later versions of the Customer Service template.

1. In Experience Builder, drag the Navigation Menu component to add it to the appropriate page in the template. We recommend adding it to the home page.
2. Create a navigation menu item pointing to a supported Salesforce object. Currently, the Customer Service template supports accounts, cases, contacts, and custom objects.



3. Publish your changes.

   Note: If your site is active, users see the changes to your navigation menu immediately.

That's it! You created a navigation menu item, that links to a list of the selected object's records. Under the hood, your data is retrieved from Salesforce and displayed using the generic Record List page. This page is available in the Customer Service template and uses the Record Home List View Lightning component to display data in an appropriate layout.

Note: The generic Record List page provides the default list view layout for objects that don't have a predefined or custom list view page assigned. For example, if you create a navigation menu item for another Salesforce object, it uses this same page. If you modify the Record List page, be sure to account for all the affected objects.

Example: A list view page for a custom object called Featured Products.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To customize an Experience Cloud site:

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  OR

- Be a member of the site AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

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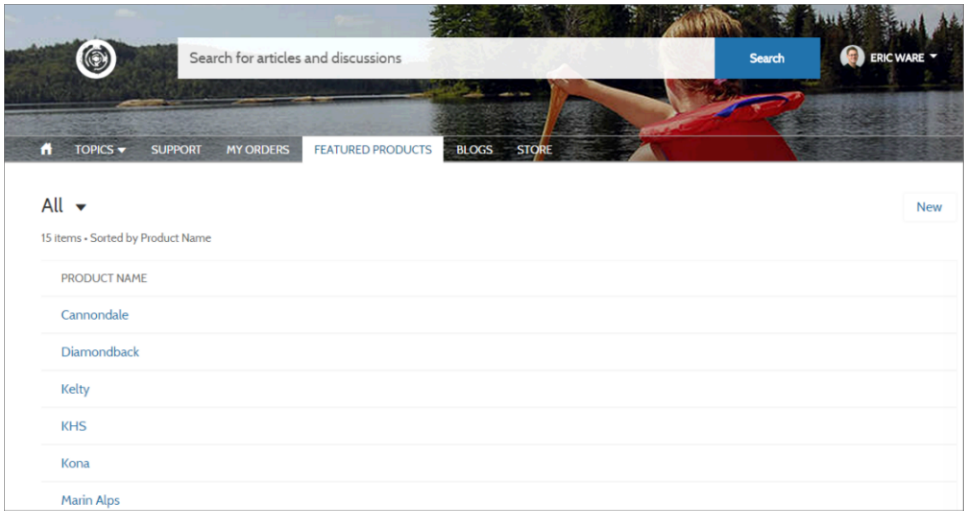
  OR

- Be a member of the site AND an experience admin or publisher in that site



- Creating a navigation menu item is the easiest way to link to a list of records for an object. If you prefer to use a custom list view page for an object, create a new page for your site using Experience Builder. Choose the Standard page type with a single-column layout. Add the Record Home List View component to the page, configure the component properties to point to the object, and then publish the page. To link to the page, create a custom navigation menu item and use the internal page URL.
- Users can access only records they have access to via licenses, profiles, permissions, and sharing rules, same as in Salesforce. Users with the "Create" permission for the object can create records from the list view page. The ability to create records from this page isn't supported on mobile devices.
- You can hide a navigation menu item from guest users to block access to the associated record list view page.
- When users click a record on this page, the record details are displayed using the layout from the generic Record Detail page. If you create a custom record detail page and assign it to the object, we use that page instead.
- Clicking a record in the list view displays the record details, which are displayed using the Record Detail page in the Customer Service template.
- When creating record list views in Experience Cloud sites using Experience Builder, picking a default list view value other than Default overrides the user's pinned list. To let users set their own pinned lists, leave the list view as Default. Otherwise, users see whatever list view was set as the default, even if they have a pinned list.

SEE ALSO:

Navigation Menu

Record List

Display Record Details in Your Site

Display record details using the generic Record Detail page or create custom record detail pages.

Note: This functionality is available in the Winter '16 and later versions of the Customer Service template.

The Customer Service template supports a standard record detail page. All objects in your site without a preassigned record detail page use this generic page, called Record Detail, to display record data. For example, consider the scenario where a user lands on a case detail page (with a preassigned case detail layout) and clicks a contact in the related records. If you haven't created a custom record detail page for contacts, the contact information is displayed using the generic Record Detail page. Under the hood, the Record Detail page uses the Record Headline and Record Information Lightning components to display record data.

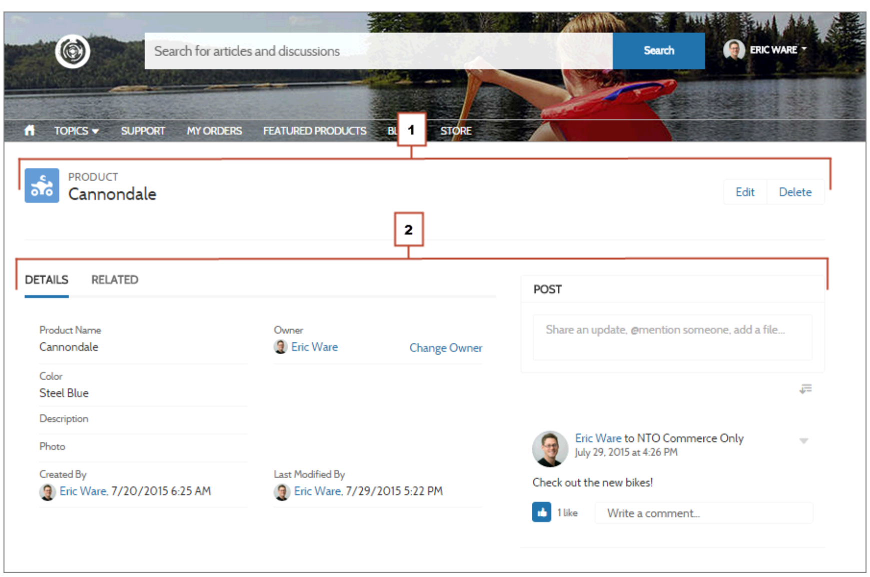
- **Record Headline**: Displays the record name and key record highlights along with buttons to edit and delete the record.
- **Record Information**: Displays all record details including related records and the record feed. It also allows users to create new related records and post to the record feed.

Optionally, you can create custom record detail pages for accounts, contacts, cases, tasks, events, and custom objects.

1. Create a new Data Detail page in Experience Builder and pick a supported object.
2. Add the Record Headline and Record Information components to the page and configure the component properties in the property panel.
3. Publish your changes.

   Note: If your site is active, your navigation menu item changes immediately appear to your users.

Example: The record detail page for a custom object with the Record Headline (1) and Record Information (2) components.



EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR
- Be a member of the site AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR
- Be a member of the site AND an experience admin or publisher in that site

- Users accessing the site on a mobile device have access to actions from the record detail page. For example, a partner user with create and edit access to accounts can create accounts or update an account as needed. However, edit inline, available on desktop, doesn't function in mobile or tablet display.
- Some objects have preassigned record detail pages to display record data (such as cases). You can check the available pages and assignments for each object in Experience Builder in Page Properties.
- Objects without preassigned record detail pages use the generic Record Detail page. If you modify the Record Detail page layout or configuration, be sure to account for all objects that use this page layout.
- Users without the necessary license, profile, and permissions can't access record data.
- Users with the necessary permissions can create records from the related lists, and edit and delete the record from the record headline. These actions aren't supported on mobile devices.
- Page layouts for each object in Salesforce determine what fields display in the Record Information component. The fields in the Highlight Panel layout determine what displays in the Record Headline component. This feature includes support for record types. You can modify the page layout, the Highlight Panel, and record type settings in Salesforce Setup.
- Enable feeds on records in Salesforce to allow users to post on them in sites.

SEE ALSO:

Record Banner

Record Information Tabs

Related Record List

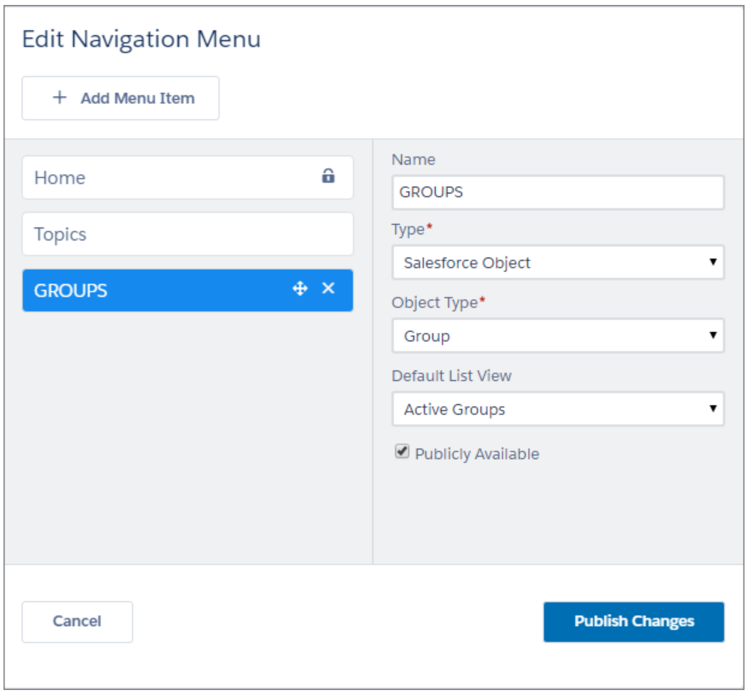
Add Groups to Your Community

Want more collaborative communities? Allow community members and guest users to browse and join groups in your Customer Service community. Use the standard design for groups or create your own customized version of the group detail page using separate components.

> **Note:** This functionality is available in the Winter '16 and later versions of the Customer Service template.

1. To enable groups in your community, add groups to the community navigation menu.

   A menu item displays that links to a list of groups in your community. If you make the menu item publicly available, even guest users who aren't logged in to your community can browse through the list of active public groups.

2. Publish your community.
3. If you haven't already, customize the group publisher layout to include the Add Member action. This action allows group owners and managers to add members to the group, and isn't shown in the list of actions in the group by default.

When users click the name of an active group in the community, they're redirected to the group detail page. If it's a private group, they're asked to log in. Only logged-in group members can view private group content.

A few things to keep in mind:

- When you enable groups in your community, the default Group Detail page is used to display group data. This page uses the Group component under the hood for formatting and layout. The Group component is a composite, one-stop component that includes the group banner, group details, related lists, and the group feed. We recommend using this composite component, especially if you want your community pages to be responsive across desktop and mobile device browsers.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

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  OR

- Be a member of the site AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

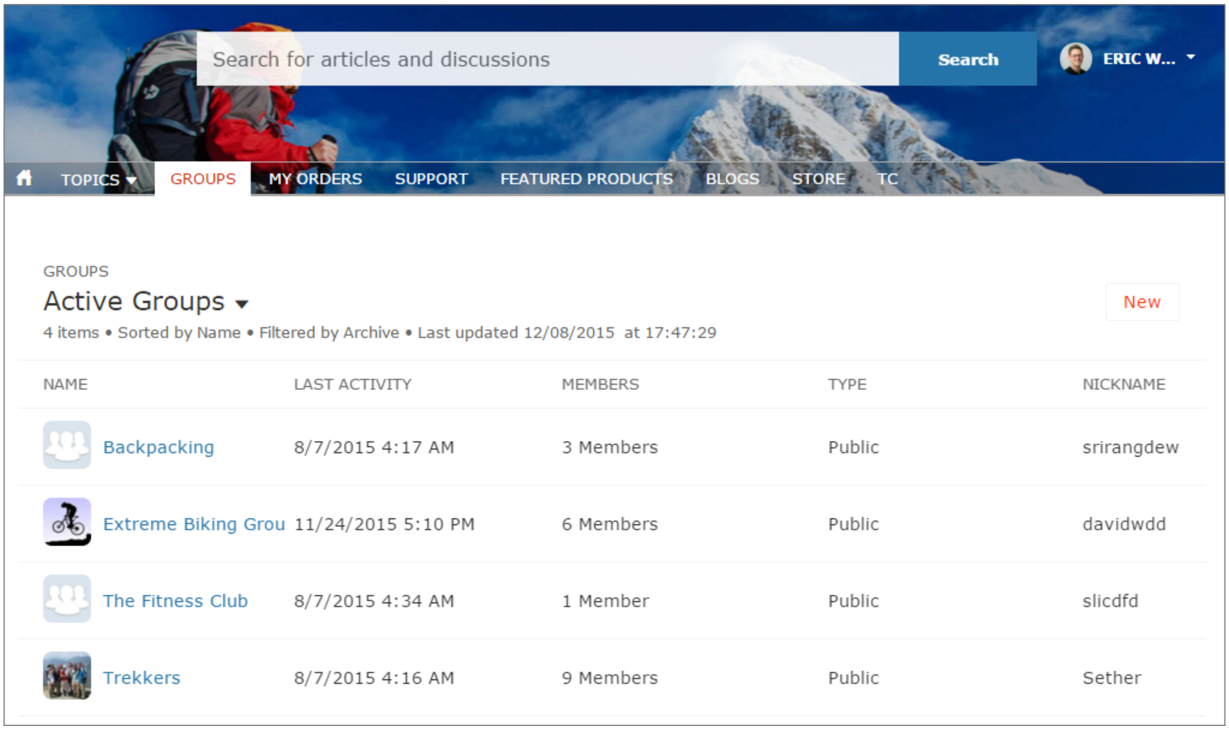
- Be a member of the site AND Create and Set Up Experiences

  OR

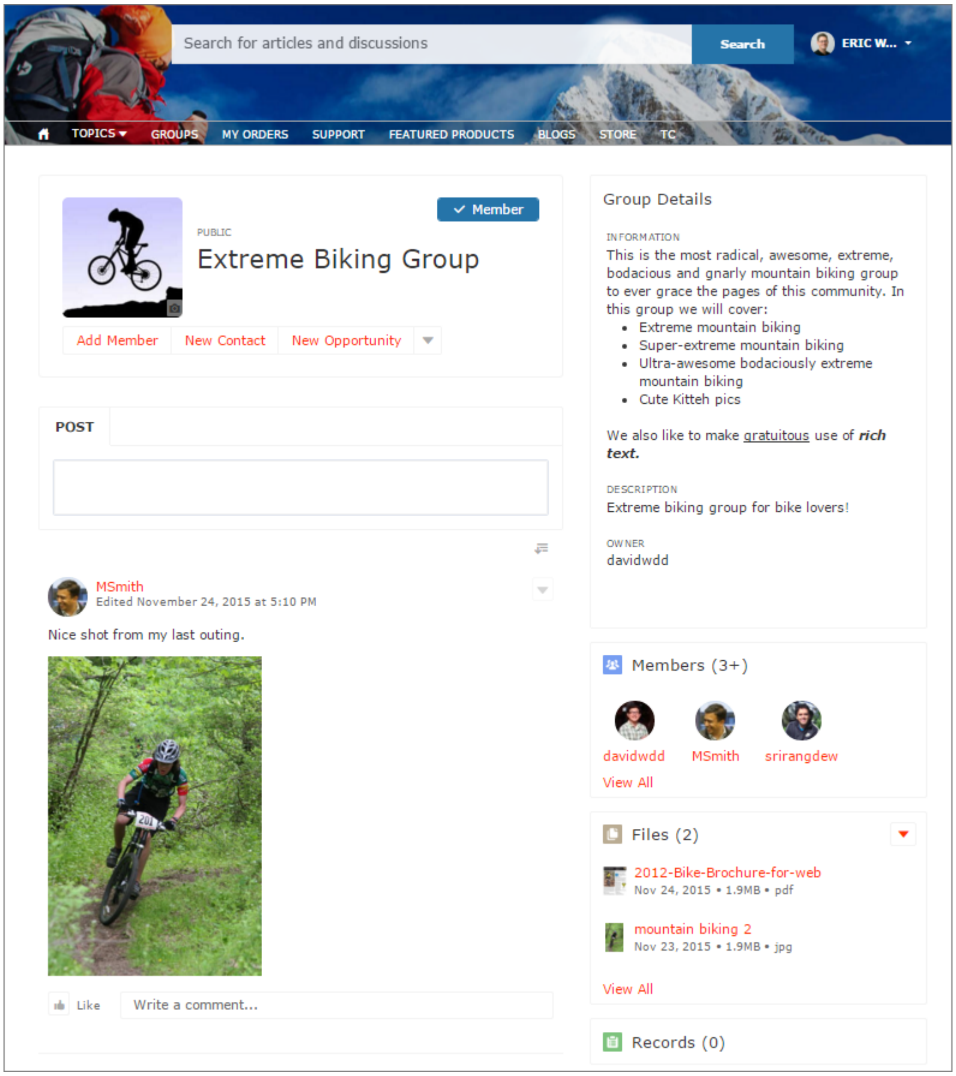
- Be a member of the site AND an experience admin or publisher in that site

- If you prefer to use a different layout or want more control over the placement of group content, create a custom community page. Then use the Group Banner, Group Details, Group Related List, and Feed components. Depending on how you use the individual components, custom pages aren't always responsive across all devices.

Group list in the Customer Service Template



Group detail page in Customer Service Template



External Data Sources in Your Experience Cloud Site

Access your external data and content that are stored outside your Salesforce org from your site.

Let your site users access:

- Data that's stored in another Salesforce org, SAP® NetWeaver Gateway, or IBM WebSphere® that your org accesses via Salesforce Connect
- Content that's stored in Google Drive or SharePoint that your org accesses via Files Connect

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

Example: Let's say you have a partner community for sales, and you store your product order information in a back-office ERP system. You can surface that information to your sales partners, enabling them to view and update orders within the context of all related data regardless of where it's stored.

Or maybe you store your templates for contracts and other agreements in a non-Salesforce environment. Your sales partners can access the latest versions of that content as needed.

SEE ALSO:

Salesforce Connect

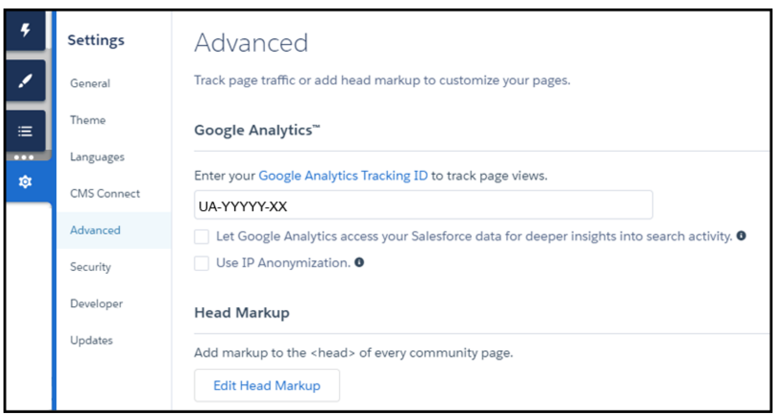
Identity Type for External Data Sources

Track Site Users with Your Google Analytics Tracking ID

Add your Google Analytics™ tracking ID to track page views. Enable access to your Salesforce data for deeper insights. Then, adjust your pages to more accurately reach your customers.

To track using Google Analytics:

1. In Experience Builder, click on the left sidebar and click **Advanced**.
2. Enter your Google Analytics tracking ID.



3. To track user types, user IDs, and search activity, enable **Let Google Analytics access your Salesforce data for deeper insights into search activity**.
4. To enable the masking of IP addresses on the Google server side, which helps with privacy compliance or concerns, **Use IP Anonymization**.
5. To enable the service, publish the site.

Your site's analytics data streams directly to the Google Analytics service where you can review and interpret it.

After you've set up Google Analytics to integrate with your data, you can either create your own reports or you can install the preconfigured Google Analytics for Salesforce Communities package. For more information, see the Google Analytics for Salesforce Communities package write-up.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

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  OR

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To publish an Experience Cloud site:

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  OR

- Be a member of the site AND an experience admin or publisher in that site

For developers of custom Lightning components, we provide the `global forceCommunity:analyticsInteraction` event. Use this event to track events triggered by the custom component.

IN THIS SECTION:

SEE ALSO:

Lightning Components Developer Guide: forceCommunity:analyticsInteraction

Configure Google Analytics™ for Experience Cloud Sites

Set up Google Analytics to track user IDs, user types, and search activity so this information can be pulled into meaningful reports.

Google Analytics integrates with your self-service site to track user types, user IDs, page views on Salesforce objects, and customer search activity. To capture this information correctly, some initial setup is required.

1. In Experience Builder, go to **Settings** > **Security**. Under **Content Security Policy**, choose **Allow Inline Scripts and Script Access to Whitelisted Third-party Hosts**.
2. Go to **Settings** > **Advanced** and enter your Google Analytics ID.

   For more information about the Google Analytics ID, check the Google Analytics documentation.
3. Select **Let Google Analytics access your Salesforce data for deeper insights into search activity**

   This step lets Google Analytics track user types, user IDs, and customer search activity in your site.
4. To enable the masking of IP addresses on the Google server side, select **Use IP Anonymization**.

   Masking IP addresses helps with privacy compliance and concerns.
5. Create custom dimensions in your Google Analytics account that capture user type and Salesforce object information.
   a. From your Google Analytics account, go to **Admin** > **Property** > **Custom Definitions** > **Custom Dimensions**, and click **+New Custom Dimension**.
   b. For the first index you want to use, enter the name: *`User Type`* and select **Hit** for the scope.
   c. For the second index, enter the name *`Salesforce Object`* and select **Hit** for the scope.

   Note: The Google Analytics console auto assigns sequential indexes based on how many variables you've created. Make sure to configure the custom dimension indexes in the site so that they match the indexes of the newly created variables.
6. Create a User-ID view.

   With the User-ID view, you can analyze how specific segments of traffic with an assigned ID engage with your content.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To customize an Experience Cloud site:
- Be a member of the site AND Create and Set Up Experiences

  OR
- Be a member of the site AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:
- Be a member of the site AND Create and Set Up Experiences

  OR
- Be a member of the site AND an experience admin or publisher in that site

a. Go to **Admin** > **Property** > **Tracking Info** > **User-ID** and follow the instructions.

b. For the User-ID view, enter the name: `User Explorer`.

7. To track the way different types of users are interacting with the site, click **Reporting** > **Audience** > **User Explorer** > **User Flow**.

After you've integrated Google Analytics, you can install the preconfigured Google Analytics for Salesforce Communities package or create your own reports. Click here for more information about the Google Analytics for Salesforce Communities package.

Multilingual Sites

Experience Builder lets you create different language versions of your site to serve separate international audiences. For example, let's say that you have customers in France and Germany. You can deliver the same site experience to each in the language that's appropriate for their region.

When you create a multilingual site, you don't have to create a separate site for each language. And there's also no need to duplicate pages within the site for each language. Instead, Experience Builder lets you add translated content to the *properties* of each component. Translating content through properties lets you maintain all languages within the site.

After you choose which languages you want your site to support, an in-built language menu lets you switch between languages when editing component properties. Content editing is quick and easy because you never have to leave the page to change to another language.

Alternatively, if you use a translation service, you can export site content as an .xml file and send it for translation. After you receive the edited file, simply import it back into your site to populate each page component with the translated content.

You can also apply your own Google Cloud Translation API key to integrate Google Translate into your feeds. Give your site the ability to instantly translate posts, questions, polls, and their comments, answers, and replies.

IN THIS SECTION:

Create a Multilingual Site

Creating a multilingual site involves a few main steps. Define the languages that you want your site to support. Add translated content for each language. And enable site visitors to choose their preferred language.

Set the Default Language for Your Site

The default language is the language that's used in a site before a user has selected another language. By default, the default language is set to English (US), and English (US) serves as the starting point when you add new languages.

Add Languages to Your Experience Builder Sites

Add the languages that you want your site to support.

Set Language Options

After you add Experience Builder sites languages, you can define separate settings for each language.

Edit Language Content on the Page

Experience Builder provides its own language menu that you can use to switch between languages as you edit content on each page. Switch languages and provide spot translations, like fixing a typo. You can also use this method for full page translations instead of exporting and importing site content.

EDITIONS

Available in: Experience Builder sites accessed through Lightning Experience, Salesforce Classic, and mobile devices, and is available in **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** editions.

USER PERMISSIONS

To create an Experience Cloud site:

- Create and Set Up Experiences AND View Setup and Configuration

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

Export Language Content

Export and prepare Experience Builder site content as one or multiple .xml files. Prepare the files for translation by creating nodes for specific languages. Then send the file to your translation service.

Import Translated Content

After your translation service has completed the translations, import the translated .xml file into your Experience Builder site.

Delete a Language

When you delete a language, the translated content isn't deleted—it's just no longer visible. When you add the language back to the Experience Builder site, you can access the translated content again.

Best Practices and Considerations for Multilingual Sites

Keep these practices and considerations in mind when you're setting up a multilingual site.

Add a Translate Button to Feed Items in Experience Builder Sites

A translation setting in Experience Builder puts a Translate with Google menu on every feed item. Translations are offered through a Google Cloud Translation API key that you provide.

SEE ALSO:

Blog post: Localization within Communities

Language Selector

Create a Multilingual Site

Creating a multilingual site involves a few main steps. Define the languages that you want your site to support. Add translated content for each language. And enable site visitors to choose their preferred language.

Here's an overview of the steps to take to create a multilingual site.

1. Set the default language for your site. It's important to set the default language before you add translated content to your site.
2. Add languages to the site.
3. Set options for each language, such as the display label and fallback language.
4. Export and prepare the content, and send it for translation. Alternatively, you can translate content directly on the page in Experience Builder.
5. Import the translated content.
6. Add a Language Selector component to your site pages, so unauthenticated users can choose their preferred language.

> Tip: Consider offering users a way to get instant translations of feed items. (Feed items include posts, questions, polls, and their comments, answers, and replies.) For more information, see Add a Translate Button to Feed Items in Experience Builder Sites on page 590.

SEE ALSO:

Best Practices and Considerations for Multilingual Sites

EDITIONS

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To customize an Experience Cloud site:

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Set the Default Language for Your Site

The default language is the language that's used in a site before a user has selected another language. By default, the default language is set to English (US), and English (US) serves as the starting point when you add new languages.

Before you add any language content to your site, you must set the site's default language. A site's default language isn't the same as the default language setting in your Salesforce org. This behavior is deliberate. Let's say you have multiple sites and want a different default language for each. At the same time, you want your org default language to be consistent. With a separate default language for your org, it's easy to set things up this way.

1. In Experience Builder, click > **Languages**.
2. Select a language from the Default Site Language list.
3. Optionally, click **Edit display label**, and change the way the selected language label appears. For example, you can use this opportunity to translate the language's display label.

Important: If you decide to change a site's default language after you add translated content, do so in this order:

1. Export site content.
2. Change the default language.
3. Import the exported file.

Changing the default language can overwrite existing translations. So you export first to preserve your original default language and your translations. After you change the default, you can import translations to restore them.

Here's how it works. Let's say you make English the default language and add French as a site language. After you add the translated French content, you decide to change the default site language to French. To preserve your original default language and existing translations, you must first export. Then, select French as the default site language, and import content back into the site.

SEE ALSO:

Add Languages to Your Experience Builder Sites
Set Language Options

EDITIONS

Available in: Experience Builder sites accessed through Lightning Experience, Salesforce Classic, and mobile devices, and is available in **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** editions.

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Add Languages to Your Experience Builder Sites

Add the languages that you want your site to support.

1. In Experience Builder, click > **Languages**.
2. Click **Add Languages**.
3. Select the languages that you want to add to your site.
4. Rearrange the list in the order that you want languages to appear.
5. Save your changes.
6. Optionally, for each language, select a fallback language.

   The fallback language is the language to use when a page doesn't have a translation for the language that the user selects. For example, imagine that a visitor chooses to view a page in French (CA), but there isn't content for that page in French (CA). The fallback language is shown instead.

   a. Under Site Languages, select a language.

   b. From the **Fallback Language** field, select a fallback language.

After you add a language to the site, the Language icon appears in the Experience Builder toolbar. Click it to switch between languages when previewing or editing page content.

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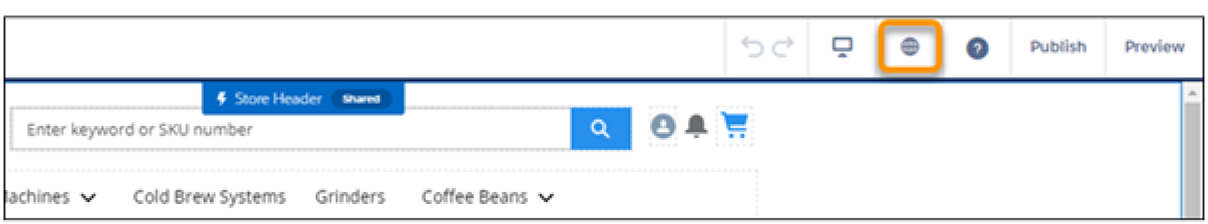

Tip: Consider offering users a way to get instant translations of feed items. (Feed items include posts, questions, polls, and their comments, answers, and replies.) For more information, see Add a Translate Button to Feed Items in Experience Builder Sites on page 590.

SEE ALSO:

Set the Default Language for Your Site

Edit Language Content on the Page

Set Language Options

Delete a Language

Set Language Options

After you add Experience Builder sites languages, you can define separate settings for each language.

1. In Experience Builder, click ⚙ > **Languages**.
2. Under Site Languages, select a language.
3. Update any of the following settings:

Option	Description
Active on Live Site	If you add a Language Selector component to your active site, this checkbox controls whether the selected language appears in the list. Use this setting to hide a language until you're ready to release the associated content to your site visitors.
Fallback Language	The fallback language appears when no content is available for the currently selected language. For example, imagine that a site visitor chooses Japanese from the language selector but your site doesn't have a Japanese translation for that page. In that case, content is shown in the fallback language.
Display Label	You can define a display label for each language. The display label appears in any Language Selector components that you add to your site and in the Experience Builder's built-in language menu.

SEE ALSO:

Add Languages to Your Experience Builder Sites

Set the Default Language for Your Site

EDITIONS

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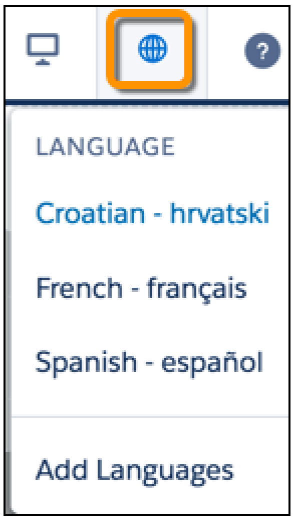
Edit Language Content on the Page

Experience Builder provides its own language menu that you can use to switch between languages as you edit content on each page. Switch languages and provide spot translations, like fixing a typo. You can also use this method for full page translations instead of exporting and importing site content.

1. Open the page you want to translate, and select a language from the Experience Builder language menu.



2. To access component properties, select the component on the page.
   By default, all component properties use the default site language, which is the language that you see until you add translated content.
3. Enter the translated content in the property fields.

Note: Experience Builder doesn't validate languages as you enter content. Take care to add the correct content for the selected language.

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- Be a member of the site AND an experience admin or publisher in that site

Export Language Content

Export and prepare Experience Builder site content as one or multiple .xml files. Prepare the files for translation by creating nodes for specific languages. Then send the file to your translation service.

Before you begin, let's look at the structure of the .xml file that's created when you export language content. The file consists of several elements, but the following elements are the key ones to focus on:

- `component` elements represent the page components that make up your site. Many of these components contain text that must be translated.
- The `field` element contains the component's properties for a particular language. The language is defined by the `language` attribute.
- `property` elements include `CDATA` tags that contain the text strings for translation.

  As you can see in this sample XML for a component, several `CDATA` tags don't contain any content. So the only `CDATA` tags that you and your translators must focus on are the ones that contain text.

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```
<component context="Contact Support Form (Aura)" id="1242fd59-76da-4cdd-b025-d0a3cb6ce496">

    <field name="AuraAttributes" language="en_US" exportcrc="811168867">
        <property name="requestSummaryText"><![CDATA[Case summary]]></property>
        <property name="callToActionText"><![CDATA[]]></property>
        <property name="headerSubtitle"><![CDATA[Tell us how we can help.]]></property>
        <property name="callToActionButtonText"><![CDATA[]]></property>
        <property name="confirmationText"><![CDATA[Your case was created.]]></property>
        <property name="confirmationSubtext"><![CDATA[We'll get back to you
soon.]]></property>
        <property name="headerTitle"><![CDATA[Contact Customer Support]]></property>
```

```
    </field>
</component>
```

To export and prepare content for translation:

1. In Experience Builder, click > **Languages**.
2. Click **Export Content**.
3. Select your default language.

   You can select a language other than your default language, but we don't recommend it unless you must export existing translations for that particular language. If you haven't yet added translations for the language, the exported file is empty.

4. Optionally, change the export file name.

   The default name of this file is `Languages.xml`, but you can rename it. Consider exporting a file for each translation, and renaming each file by its country code. For example, let's say you intend to get translations for French, Spanish, and German. You can rename them `language_fr.xml`, `language_es_mx.xml`, and `language_de.xml` respectively.

5. Click **Export**.
6. If you're prompted to, choose where to save the file.
7. Prepare the .xml file for translation.
   a. Copy the `field` element for the content to be translated, and paste the copy under the original.

```
<?xml version="1.0" encoding="utf-8"?>
<languagedata exporttimestamp="1571785567488" version="1.0">
        <component context="headline (Aura)" id="daf8a622-7095-4181-0bd0-d982e0c084fb">

                <field name="AuraAttributes" language="en_US" exportcrc-"1520676044">
                        <property name="bannerTextWithKnowledge"><![CDATA[Explore other <a href="javascript:void(0)"
                        class="headlineArticles">articles</a> and >a href="javascript:void(0)"
                        class="headlineDiscussions">discussions</a> on this topic.]]</property>
                        <property name="bannerTextWithKnowledge"><![CDATA[Explore other <a href="javascript:void(0)"
                        class="headlineDiscussions">discussions</a> on this topic.]]</property>
                        <property name="bannerText"><![CDATA[A place to find solutions and ask questions]]></property>
                        <property name="title"><![CDATA[Welcome!]]></property>
                </field>

        </component>
</languagedata>
```

   You can copy a `field` element multiple times for multiple translations in one file. However, to reduce the chance of overwriting existing translations when importing new ones, we recommend that you export a separate `Languages.xml` file for each translation.

   b. Update the `language` attribute in the pasted `field` element to the new language.

```
<?xml version="1.0" encoding="utf-8"?>
<languagedata exporttimestamp="1571785567488" version="1.0">
        <component context="headline (Aura)" id="daf8a622-7095-4181-0bd0-d982e0c084fb">

                <field name="AuraAttributes" language="en_US" exportcrc="1520676044">
                        <property name="bannerTextWithKnowledge"><![CDATA[Explore other <a href="javascript:void(0)"
                        class="headlineArticles">articles</a> and >a href="javascript:void(0)"
                        class="headlineDiscussions">discussions</a> on this topic.]]</property>
                        <property name="bannerTextWithKnowledge"><![CDATA[Explore other <a href="javascript:void(0)"
                        class="headlineDiscussions">discussions</a> on this topic.]]</property>
                        <property name="bannerText"><![CDATA[A place to find solutions and ask questions]]></property>
                        <property name="title"><![CDATA[Welcome!]]></property>
                </field>

                <field name="AuraAttributes" language="af" exportcrc="1423078063">
                        <property name="bannerTextWithKnowledge"><![CDATA[Afrikaans translation]]</property>
                        <property name="bannerTextWithKnowledge"><![CDATA[Afrikaans translation]]</property>
                        <property name="bannerText"><![CDATA[Afrikaans translation]]></property>
                        <property name="title"><![CDATA[Afrikaans translation]]></property>
                </field>

        </component>
</languagedata>
```

c. Save your changes.

After you export and prepare the .xml file, you can send it for translation. Ask your translators to put translated content between the brackets that follow the `CDATA` tags.

```
<?xml version="1.0" encoding="utf-8"?>
<languagedata exporttimestamp="1571785567488" version="1.0">
        <component context="headline (Aura)" id="daf8a622-7095-4181-0bd0-d982e0c084fb">

                <field name="AuraAttributes" language="en_US" exportcrc="1520676044">
                        <property name="bannerTextWithKnowledge"><![CDATA[Explore other <a href="javascript:void(0)"
                        class="headlineArticles">articles</a> and >a href="javascript:void(0)"
                        class="headlineDiscussions">discussions</a> on this topic.]]</property>
                        <property name="bannerTextWithKnowledge"><![CDATA[Explore other <a href="javascript:void(0)"
                        class="headlineDiscussions">discussions</a> on this topic.]]</property>
                        <property name="bannerText"><![CDATA[A place to find solutions and ask questions]]></property>
                        <property name="title"><![CDATA[Welcome!]]></property>
                </field>

                <field name="AuraAttributes" language="af" exportcrc="1423078063">
                        <property name="bannerTextWithKnowledge"><![CDATA[Afrikaans translation]]</property>
                        <property name="bannerTextWithKnowledge"><![CDATA[Afrikaans translation]]</property>
                        <property name="bannerText"><![CDATA[Afrikaans translation]]></property>
                        <property name="title"><![CDATA[Afrikaans translation]]></property>
                </field>

        </component>
</languagedata>
```

Note: If possible, avoid updating the site's default content until after you receive and import your translated content. Because the translated file contains the original default content and the translated content, when you import the file, you overwrite updates made in the interim.

When you receive the translated .xml file, import it back into the site.

SEE ALSO:

Import Translated Content

Import Translated Content

After your translation service has completed the translations, import the translated .xml file into your Experience Builder site.

Warning: Import overwrites the current translation values in your site. Before you import the file, ensure that the .xml file matches the expected format and is well formed.

If possible, avoid updating the site's default content until after you receive and import your translated content. Because the translated file contains the original default content and the translated content, when you import the file, you overwrite updates made in the interim.

1. In Experience Builder, click > **Languages**.
2. Click **Import Translation**.
3. Browse to the file or drag it onto the window.
   For files under 1 MB, a message tells you whether the content was imported successfully. For files over 1 MB, you receive an email when the import process finishes.

After you import the translated content, test your pages to make sure that content displays correctly. Use the language selector to view each page in a supported language.

SEE ALSO:

Export Language Content

EDITIONS

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USER PERMISSIONS

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- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

Delete a Language

When you delete a language, the translated content isn't deleted—it's just no longer visible. When you add the language back to the Experience Builder site, you can access the translated content again.

1. In Experience Builder, click ⚙ > **Languages**.
2. Under Site Languages, click 🗑 next to the language that you want to delete.

SEE ALSO:

[Add Languages to Your Experience Builder Sites]

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Best Practices and Considerations for Multilingual Sites

Keep these practices and considerations in mind when you're setting up a multilingual site.

EDITIONS

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General Best Practices and Considerations

- Set the site's default language before you begin adding translated content to your site.
- For each translation, export a separate `Languages.xml` file to reduce the chance of overwriting any existing translations when importing new translations. For easier identification, we recommend renaming each file to include its country code—for example, `languages_de.xml`, `languages_fr_ca.xml`.
- When preparing files for translation, ensure that the file contains the default language and only one other language. When you import the file after translation, this best practice helps avoid overwriting any other languages.
- If possible, avoid updating the site's default content until after you receive and import your translated content. Because the translated file contains the original default content and the translated content, when you import the file, you overwrite any updates made in the interim.
- If you decide to change a site's default language after you add translated content, do so in this order:
  1. Export site content.
  2. Change the default language.
  3. Import the exported file.

  You export first because changing the default language can overwrite existing translations. Export first to preserve your original default language and your translations. Then, after changing the default, import translations to restore them.

  Here's how it works. Let's say that you make English the default language and add French as a site language. After you add the translated French content, you decide to change the default site language to French. To preserve your original default language and existing translations, you must first export site content. Then select French as the default site language, and import content back into the site.

Best Practices and Considerations for Guest Users

- Add a language selector to all public pages, and make it easy to spot. It's the only way that guest users and unauthenticated visitors can select their language.
- For pages that require authentication, we automatically show page content in the authenticated user's default language.
- Customized labels and Knowledge articles use the translations that the site admin added in Translation Workbench.

SEE ALSO:

Blog post: Localization within Communities

Language Selector

Add a Translate Button to Feed Items in Experience Builder Sites

A translation setting in Experience Builder puts a Translate with Google menu on every feed item. Translations are offered through a Google Cloud Translation API key that you provide.

Before you configure translation, go to https://cloud.google.com/translate, and get your translation key.

Note: Google Cloud Translation is a subscription service. For pricing information, see https://cloud.google.com/translate/pricing.

Take these steps to add a Google Cloud Translation API key to your site.

1. In Experience Builder, go to **Settings** > **Languages** and enter your Google Cloud Translation API key.
2. Click **Validate & Save Key**.

   This action checks the validity of your key, and, if valid, saves your setting.

After you verify and save your key, a **Translate with Google** menu appears on all feed items in your site. Feed items include posts, questions, polls, and their comments, answers, and replies.

- To translate the feed item into the default language, click **Translate with Google**.

  For site members, the default language comes from the locale that's set on the user's profile. For guest users, it comes from the locale that's set in the user's browser.

- To select a language, click the menu icon and select a language from the list.

These languages appear on the translation list.

Albanian	Arabic	Armenian	Basque	Bengali
Bosnian	Bulgarian	Catalan	Chinese Simplified	Chinese Traditional
Croatian	Czech	Danish	Dutch	English
Estonian	Finnish	French	Georgian	German
Greek	Hebrew	Hindi	Hungarian	Icelandic
Indonesian	Irish	Italian	Japanese	Korean
Latvian	Lithuanian	Luxembourgish	Macedonian	Malay
Maltese	Montenegrin	Norwegian	Polish	Portuguese
Romanian	Romansh	Russian	Serbian	Slovak
Slovenian	Spanish	Swedish	Tagalog	Tamil
Thai	Turkish	Ukrainian	Urdu	Vietnamese
Welsh	—	—	—	—

After translation, **Translate with Google** switches to **View Original**, so it's easy to switch back to the original language.

EDITIONS

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USER PERMISSIONS

To configure feed translations in a site

- Is a System Administrator OR has the permission
- Manage Experiences OR Create and Set Up Experiences
- AND is a member of the site

Improve Experience Cloud Site Performance

Use the Page Optimizer to analyze your site's performance. Use the **Experience Cloud Content Delivery Network** and **browser caching** to improve page load times.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

IN THIS SECTION:

Analyze and Improve Experience Builder Site Performance

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

Experience Cloud Performance and Scale Best Practices

Experience Cloud sites are used for a variety of purposes—from delivering a help forum or support community, to hosting a store, to deploying a customized vaccination site used to schedule vaccinations for millions of people. Salesforce tests Experience Cloud features to ensure that they continue to perform when there are spikes in site traffic. Follow these guidelines to avoid performance issues that can occur when scale limits are exceeded.

Experience Cloud Content Delivery Networks (CDN) Overview

Deliver Salesforce content to your users with higher performance and scale than ever when you set up a free Experience Cloud Content Delivery Network (CDN). Reduce the page load time for your sites through Experience Cloud or to custom applications through public channels.

Improve Experience Cloud Site Performance with Browser Caching

If you use many components in your Experience Builder site, you can improve your site's performance with browser caching. Performance is about the same for the first page load, but subsequent page loads are faster. The cache is encrypted and secure.

Progressive Rendering Overview

Progressive Rendering prioritizes the display order of your page components. With proper planning and testing, it can improve display time performance and polish your site's experience to better engage customers.

Progressive Rendering Guidelines

Here are some guidelines for how to get the most out of Progressive Rendering.

Prioritize Component Display Order with Progressive Rendering

Quickly set the display order of components on your Experience Builder pages with Progressive Rendering. By carefully optimizing how your pages display, you can enhance the experience of your site and better engage your community.

Analyze and Improve Experience Builder Site Performance

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

To download the Page Optimizer, in Experience Builder, click on the left sidebar, and then click **Advanced**.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

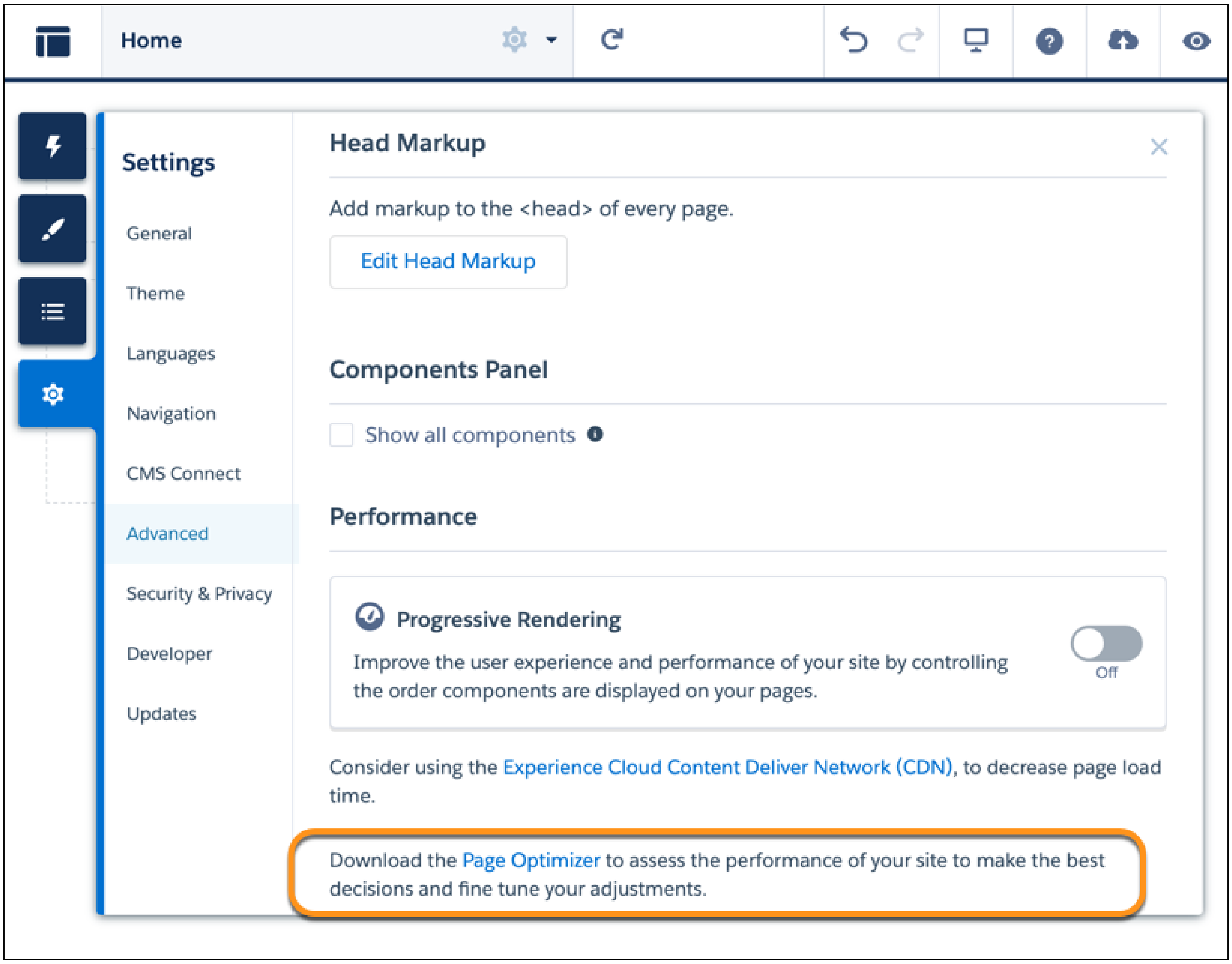
- Be a member of the site AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

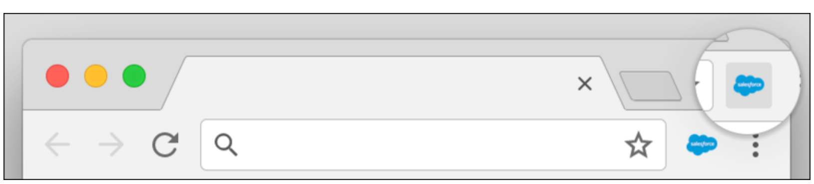
- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

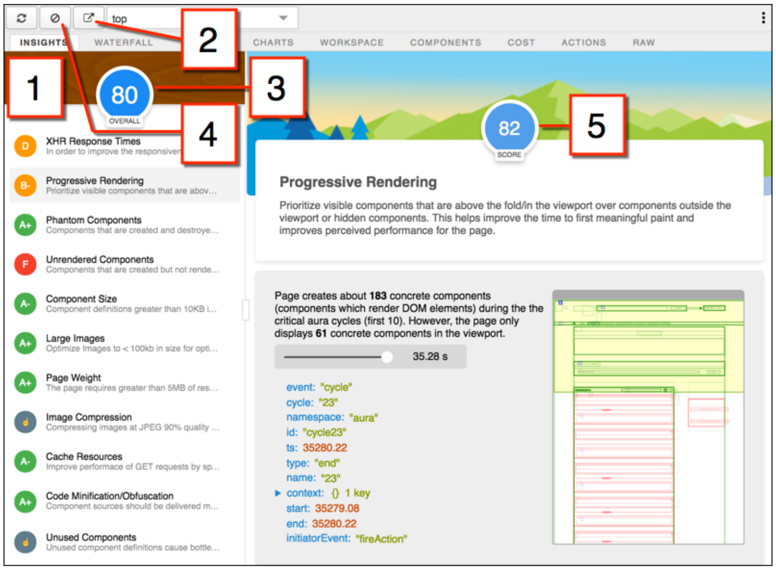


After installation, the Page Optimizer is located with your other Chrome extensions.



Insights

To analyze your site, navigate to your published site, load the page, and then launch the Page Optimizer.



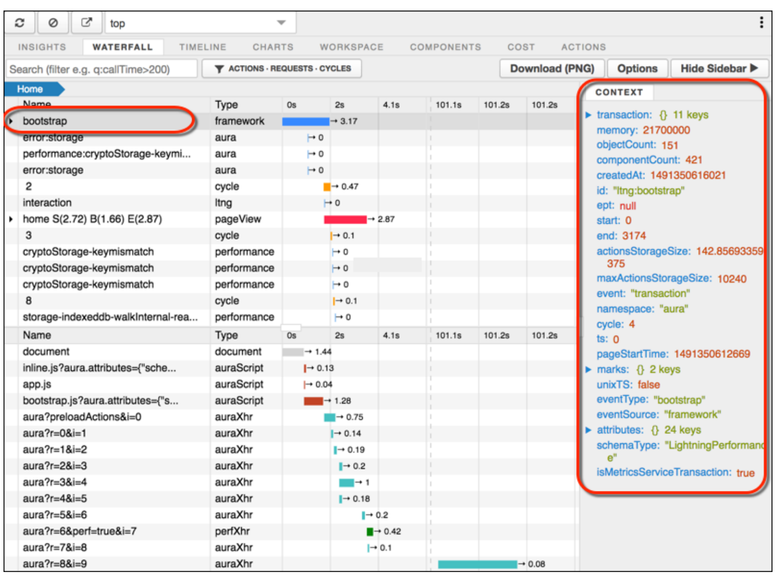
The Insights tab (1) evaluates your page based on best practices for web applications developed using the Lightning framework. This tab displays an overall performance score (3) along with individual scores (5) for various analysis rules. To view details and suggested actions, click each rule. For more room to work, click **Popout** (2).

The Insights tab is conservative in providing recommendations. For further insights, consider reviewing the raw data presented on the Waterfall, Timeline, Charts, Cost, and Actions tabs.

To remove collected metrics, click **Clear** (4). Perform some user actions on the page to collect new metrics, and then reopen the Page Optimizer. For example, to gather performance metrics for liking a feed item, clear performance metrics, click Like, and reopen the Page Optimizer.

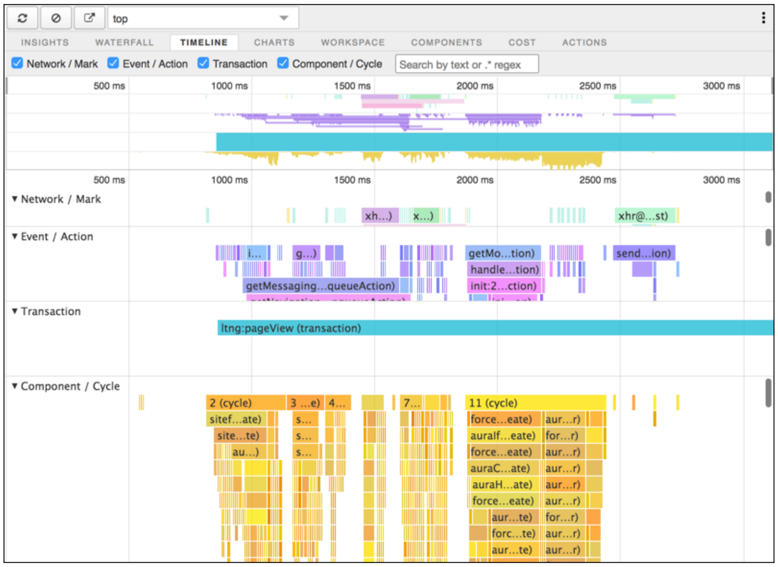
Waterfall

The Waterfall tab displays all network requests and performance instrumentation data. Click a row to view contextual information in the sidebar. Click the arrow to the left of each row to expand the information for each row.



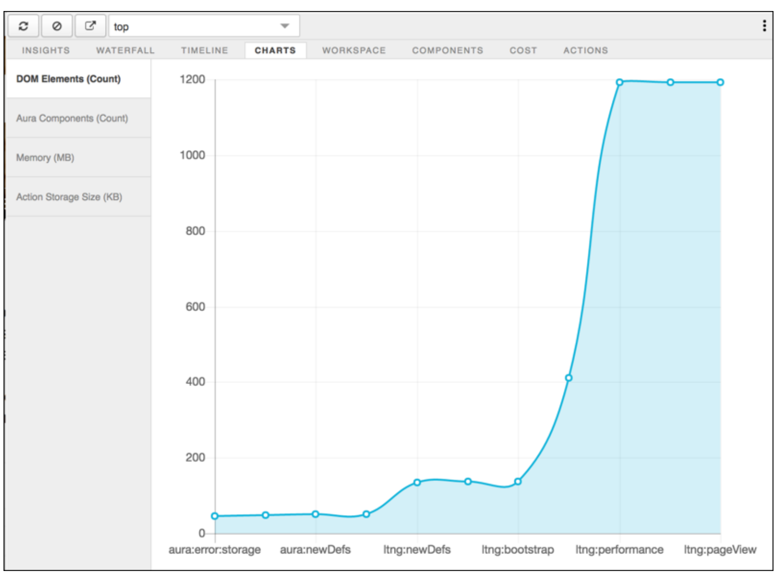
Timeline

The Timeline tab provides a profile of each component's rendering lifecycle. The timeline view is optimized for displaying Lightning framework metrics, so it's easier to interpret than Chrome DevTools.



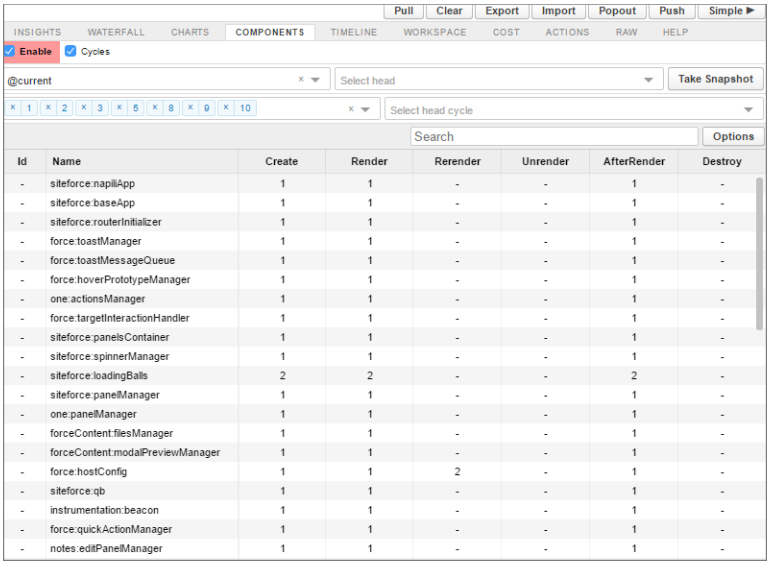
Charts

The Charts tab displays trending information about memory and components as customers use your page.



Components

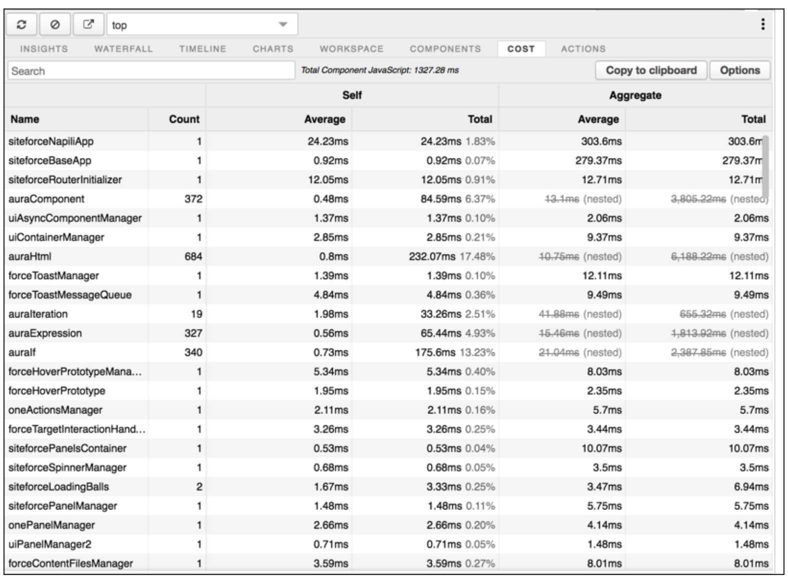
The Components tab displays the lifecycle counts for each component on the page. This view helps you identify potential component leaks and unexpected rendering behavior. Use the Component tab along with the Cost tab for an overall view of component performance.



Id	Name	Create	Render	Rerender	Unrender	AfterRender	Destroy
-	siteforce:napiliApp	1	1	-	-	1	-
-	siteforce:baseApp	1	1	-	-	1	-
-	siteforce:routerInitializer	1	1	-	-	1	-
-	force:toastManager	1	1	-	-	1	-
-	force:toastMessageQueue	1	1	-	-	1	-
-	force:hoverPrototypeManager	1	1	-	-	1	-
-	one:actionsManager	1	1	-	-	1	-
-	force:targetInteractionHandler	1	1	-	-	1	-
-	siteforce:panelsContainer	1	1	-	-	1	-
-	siteforce:spinnerManager	1	1	-	-	1	-
-	siteforce:loadingBalls	2	2	-	-	2	-
-	siteforce:panelManager	1	1	-	-	1	-
-	one:panelManager	1	1	-	-	1	-
-	forceContent:filesManager	1	1	-	-	1	-
-	forceContent:modalPreviewManager	1	1	-	-	1	-
-	force:hostConfig	1	1	2	-	1	-
-	siteforce:qb	1	1	-	-	1	-
-	instrumentation:beacon	1	1	-	-	1	-
-	force:quickActionManager	1	1	-	-	1	-
-	notes:editPanelManager	1	1	-	-	1	-

Cost

The Cost tab displays the amount of time each component was busy processing its logic. The lower the time, the better the performance.



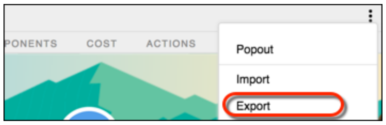
		Self		Aggregate	
Name	Count	Average	Total	Average	Total
siteforceNapiliApp	1	24.23ms	24.23ms 1.83%	303.6ms	303.6m
siteforceBaseApp	1	0.92ms	0.92ms 0.07%	279.37ms	279.37m
siteforceRouterInitializer	1	12.05ms	12.05ms 0.91%	12.71ms	12.71m
auraComponent	372	0.48ms	84.59ms 6.37%	~~13.1ms~~ (nested)	~~3,805.22ms~~ (nested)
uiAsyncComponentManager	1	1.37ms	1.37ms 0.10%	2.06ms	2.06ms
uiContainerManager	1	2.85ms	2.85ms 0.21%	9.37ms	9.37ms
auraHtml	684	0.8ms	232.07ms 17.48%	~~10.75ms~~ (nested)	~~6,188.22ms~~ (nested)
forceToastManager	1	1.39ms	1.39ms 0.10%	12.11ms	12.11ms
forceToastMessageQueue	1	4.84ms	4.84ms 0.36%	9.49ms	9.49ms
auraIteration	19	1.98ms	33.26ms 2.51%	~~41.88ms~~ (nested)	~~655.32ms~~ (nested)
auraExpression	327	0.56ms	65.44ms 4.93%	~~15.46ms~~ (nested)	~~1,813.92ms~~ (nested)
auraIf	340	0.73ms	175.6ms 13.23%	~~21.04ms~~ (nested)	~~2,387.85ms~~ (nested)
forceHoverPrototypeMana...	1	5.34ms	5.34ms 0.40%	8.03ms	8.03ms
forceHoverPrototype	1	1.95ms	1.95ms 0.15%	2.35ms	2.35ms
oneActionsManager	1	2.11ms	2.11ms 0.16%	5.7ms	5.7ms
forceTargetInteractionHand...	1	3.26ms	3.26ms 0.25%	3.44ms	3.44ms
siteforcePanelsContainer	1	0.53ms	0.53ms 0.04%	10.07ms	10.07ms
siteforceSpinnerManager	1	0.68ms	0.68ms 0.05%	3.5ms	3.5ms
siteforceLoadingBalls	2	1.67ms	3.33ms 0.25%	3.47ms	6.94ms
siteforcePanelManager	1	1.48ms	1.48ms 0.11%	5.75ms	5.75ms
onePanelManager	1	2.66ms	2.66ms 0.20%	4.14ms	4.14ms
uiPanelManager2	1	0.71ms	0.71ms 0.05%	1.48ms	1.48ms
forceContentFilesManager	1	3.59ms	3.59ms 0.27%	8.01ms	8.01ms

Actions

The Actions tab displays a list of all actions performed on the page along with their timing information.

Export

Export your analysis to a file to share with your development and support teams.



Submit Feedback

We want to hear from you. Share your comments, questions, requests, and any issues that you find. Submit Feedback.

Experience Cloud Performance and Scale Best Practices

EDITIONS

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

Experience Cloud sites are used for a variety of purposes—from delivering a help forum or support community, to hosting a store, to deploying a customized vaccination site used to schedule vaccinations for millions of people. Salesforce tests Experience Cloud features to ensure that they continue to perform when there are spikes in site traffic. Follow these guidelines to avoid performance issues that can occur when scale limits are exceeded.

Performance issues typically occur when scale limits are exceeded. The following are the most common causes of performance issues:

- The number of and type of licenses used for your site.
- The number of logins per month.
- The number of page views per month.
- Normal site traffic and peak site traffic.
- The number of customizations made to a site.

If your site exceeds scale limits, Salesforce can start an internal review process. If you aren't sure if your site is reaching or exceeding scale limits, contact your account executive for help.

How To Improve Performance and Scale

Consider the following when developing your site:

- **Performance and Scale Testing** — Test for performance and scale before deploying your Experience Cloud site. Customizations to core features and adding Apex, SOQL, and SOSL code can impact the performance of your site. Sites expecting heavy spikes in usage can also run into performance issues.
- **Content Delivery Network (CDN)** — Use a content delivery network (CDN). Using Salesforce's CDN can improve the performance and scale of a site, regardless of size and customizations. Customers can also use their own CDN.
- **Waiting Room** — Sites expecting heavy traffic should use a waiting room. Ticketing sites, vaccine management sites, or stores holding closeout sales often experience large spikes in traffic. A waiting room helps ensure that your customers have the best possible experience when traffic spikes delay immediate access to a site.

  Note: Vaccine management sites may not function properly without a CDN and a waiting room in place. Contact your account executive if you have any questions.

Experience Cloud Content Delivery Networks (CDN) Overview

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

Deliver Salesforce content to your users with higher performance and scale than ever when you set up a free Experience Cloud Content Delivery Network (CDN). Reduce the page load time for your sites through Experience Cloud or to custom applications through public channels.

All of the assets to develop your Experience Cloud site, such as CSS files, JavaScript libraries, and images, are stored on your company's Salesforce instance. For example, if your Salesforce instance is on NA1, your server is in North America. The farther your users are from your Salesforce server, the longer it takes to get assets to their computer and your site's pages.

Content delivery networks (CDN)s are the industry standard for web applications. They deliver faster experiences and help maintain performance at scale. A CDN minimizes delays in loading web page content by reducing the distance between the server and the user. It also increases the number of requests the server can respond to, since the CDN offloads a large portion of hits to your site. Experience Cloud sites served through the Experience Cloud CDN support HTTP/2 for fast content delivery.

> **Important:** Salesforce is unable to serve a top-level domain, such as `example.com`, using the built-in CDN. We can only serve subdomains, such as `www.example.com` or `parts.example.com`. If your site needs a top-level domain served from CDN, host it on a CDN outside of Salesforce.

With the Experience Cloud CDN, you can store your publicly cacheable assets on servers around the world to deliver your content quickly and efficiently. Salesforce also provides you with a secure HTTPS site and certificates. If you're an Experience Cloud customer, you're allowed up to 48 terabytes per org per year. If more than 48 terabytes are required to handle the traffic on your site, contact your account executive to discuss additional capacity.

> **Note:** Our Experience Cloud CDNs are supported in production environments. They aren't supported in Developer and Partner Developer editions because they don't support custom domains. They also aren't supported in sandbox environments.

IN THIS SECTION:

Considerations for Using a Content Delivery Network (CDN) for Your Experience Cloud Site

Use an Experience Cloud Content Delivery Network (CDN) to serve content to your site. Understand how resources are cached, the frequency of server certificate changes, and recommended activation timing. After your domain is on the CDN, there are implications to changing your CNAME or switching domains.

Experience Cloud Content Delivery Network (CDN) Prerequisites

Complete these required steps before setting up your Experience Cloud Content Delivery Network (CDN).

Set Up the Experience Cloud Content Delivery Network (CDN)

After you review the considerations and complete the prerequisites, set up an Experience Cloud Content Delivery Network (CDN) for your domain. This feature is available in Experience Builder and Salesforce Tabs and Visualforce sites.

Content Delivery Network for Digital Experiences with Enhanced Domains

When you enable enhanced domains, the format of your Experience Cloud site URL changes from ExperienceCloudSitesSubdomainName.force.com to MyDomainName.my.site.com. Your *.my.site.com domain includes the Experience Cloud content delivery network (CDN). The CDN delivers faster experiences and helps maintain performance at scale. It minimizes delays in loading web page content by reducing the distance between the server and the user. It also increases the number of requests that the server can respond to, because the CDN offloads a large portion of hits to your site.

Experience Cloud Content Delivery Network (CDN) Traffic Allowances

Each byte of traffic that's requested on your custom domain, whether it's an image or a complex report, counts toward your content delivery network's (CDN) usage amount. The amount of traffic allowed over a CDN depends on the license that you've purchased. Understand how to monitor your Experience Cloud Content Delivery Network (CDN) usage and what happens if you exceed the Terabyte limit.

SEE ALSO:

Add a Domain

Manage Domains and Custom URLs

Considerations for Using a Content Delivery Network (CDN) for Your Experience Cloud Site

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

Use an Experience Cloud Content Delivery Network (CDN) to serve content to your site. Understand how resources are cached, the frequency of server certificate changes, and recommended activation timing. After your domain is on the CDN, there are implications to changing your CNAME or switching domains.

Experience Cloud CDNs are supported in production environments. They aren't supported in Developer and Partner Developer editions because they don't support custom domains. They also aren't supported in sandbox environments.

Review these considerations when you enable the Salesforce CDN partner, Akamai, for your site in Setup.

HTTP/2 Support

Experience Cloud sites served through the Experience Cloud CDN support HTTP/2.

Cached Resources

These resources are cached on the CDN to improve page load time performance:

- Resources that are accessible in a public site without authentication, including HTML, JavaScript, CSS, image, and font files.
- Resources that are configured as publicly cacheable, such as Salesforce static resources with the Cache Control setting configured to Public.

Adding a Domain When Provisioning a CDN

If you add a domain and provision a CDN at the same time, visitors to your site could see a certificate error. The hostname on the certificate doesn't match the custom domain until you activate the domain. Activating the domain resolves the error message.

The provisioning process can take 4–14 hours to complete, and then you must activate the domain within Salesforce. Activation creates or updates a domain CNAME, and that can take up to 20 minutes to be effective across the internet.

Until you activate the domain, the domain uses its previous HTTPS configuration. If you add a domain to your org with our CDN partner, the initial configuration before activation is HTTP.

Important: Salesforce is unable to serve a top-level domain, such as `example.com`, using the built-in CDN. We can only serve subdomains, such as `www.example.com` or `parts.example.com`. If your site needs a top-level domain served from CDN, host it on a CDN outside of Salesforce.

Switching Domains

When switching a domain previously added to the org as HTTP-only or as HTTPs with a certificate, the provisioning process takes 4–12 hours. After you activate the domain, visitors to your site can observe these issues for up to 5 minutes:

- Connection reset errors. The site doesn't load.
- The message Server DNS address couldn't be found.

Review these considerations when you enable an Experience Cloud CDN for your site in Setup or for custom applications through public channels:

Activation Timing

To minimize the impact to your users, provision and activate an Experience Cloud CDN where your site traffic is low.

Server Certificates

If you have an existing Custom Domain that's on a shared certificate, you may see a shared option while configuring the Experience Cloud CDN. Shared certificates aren't recommended. With the Experience Cloud shared certificate CDN, the certificate that your domain uses is shared with other customers. Shared certificates often include other customer hostnames in the subject alternative name list. With the Experience Cloud shared certificate CDN, the server certificate changes frequently. If you have API clients that require the exact server certificate rather than the root certificate authority, use a single certificate CDN rather than a shared certificate CDN.

To switch from a shared certificate to a single certificate, move your domain to the **Temporary non-HTTPS** domain HTTPS option and save your changes. Then delete the domain, and add your custom domain again, selecting the **Salesforce serves the domain over HTTPS, using a Salesforce content delivery network (CDN) partner** HTTPS option.

Single certificates contain a single branded name per certificate. Ten Experience Cloud CDN single certificates and 48 terabytes of traffic are available for orgs that have purchased any Experience Cloud licenses. If you haven't purchased an Experience Cloud license, your org is able to provision 5 single certificates, and is given 5 TB of annual traffic. You can contact your account executive to increase the traffic allowances. Contact Salesforce Customer Support to increase the number of certificates available per org.

Data Privacy & Security

When you enable the CDN, your domain uses Akamai, a third-party CDN service, to optimize its content delivery. Akamai stores and transmits all information sent to, or returned by this domain, including:

- Data submitted to the domain
- Web page content returned from the domain
- Data tables from web pages returned from the domain
- Images
- Files
- JavaScript code
- Style sheets
- Static resources

Akamai can offer different privacy and security protections than Salesforce. Salesforce isn't responsible for the privacy and security of the data that's shared with Akamai. All communications between Akamai and Salesforce are conducted over HTTPs.

Domain CNAME Changes

Your domain must use the same CNAME as shown on the Domains Setup page. If you change your CNAME after activating the Experience Cloud CDN, your domain traffic goes to your servers directly, no longer passing through the CDN. After the shared certificate is updated or renewed, the Domain Setup page lists Salesforce serves the domain over HTTP without support for HTTPS access as the option for your domain.

If you change your domain's CNAME and want to resume use of the Experience Cloud CDN, update your domain in Salesforce to the correct CNAME. And then provision the domain again with the CDN option.

Changing the CDN with Single Sign-On

Changing the Experience Cloud CDN affects SAML Single Sign-On Settings for all custom URLs in that domain. Reconfirm the SAML Single Sign-On Settings for each HTTPS custom URL in that domain after activating a change. Login Settings are available in Experience Workspaces under Administration | Login & Registration.

SEE ALSO:

- View and Edit Single Sign-On Settings
- Add a Domain
- Manage Domains and Custom URLs
- Create a Custom Report Type

Experience Cloud Content Delivery Network (CDN) Prerequisites

Complete these required steps before setting up your Experience Cloud Content Delivery Network (CDN).

Experience Cloud CDNs are supported in production environments. They aren't supported in Developer or Partner Developer editions because they don't support custom domains. They also aren't supported in sandbox environments.

Before you activate this feature, read the Considerations for Using a CDN for Your Experience Cloud Site on page 599.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

Domain CNAME

Your domain must use the same CNAME as shown on the Domains Setup page. If the CNAME doesn't match, the domain can't connect via the CDN.

Certificate Authority Authorization (CAA) Records

Experience Cloud CDNs use Let's Encrypt as its certificate authority. Before you set up an Experience Cloud CDN for your domain:

1. If your domain doesn't have a current CAA record, leave as is.
2. If your domain or the subdomain that you're adding to the CDN has a Certification Authority Authorization (CAA) record, add the Let's Encrypt website, letsencrypt.org, to the record.
3. If your company decides to set up a CAA record in the future, add Let's Encrypt to the record to avoid disruption to your CDN.

See Let's Encrypt website for more information.

Let's Encrypt High Valued Domains

Let's Encrypt requires consent from the owner of high value domains from its High Value Domains list before allowing a CAA certificate change for those domains. This list of High Value Domains isn't publicly available.

If your domain is on this list of High Value Domains, contact Let's Encrypt to temporarily remove the block before configuring your Experience Cloud CDN. If your CDN request fails or it remains in a status of provisioning for more than a day, contact Salesforce Customer Support for assistance.

Using an Existing External Domain

If you have an existing domain hosted outside of Salesforce (for example, abccompany.com) and it isn't currently registered with Akamai:

1. Enable external HTTPS on your domain and point to your current configuration.
2. Change the domain to the Experience Cloud CDN.

Current Akamai Customers

If you have a registered domain with Akamai that you intend to use for your Experience Cloud CDN, remove the domain from your Akamai configuration. If the domain is active in another Akamai configuration, the Experience Cloud CDN provisioning process fails.

Notify Akamai if you have a wildcard domain available in a different Akamai configuration and intend to use one of its subdomains for your Experience Cloud CDN.

For example, a customer with *.abccompany.com as a wildcard in their Akamai configuration wants to add experiences.abccompany.com as their Experience Cloud CDN domain. If the customer doesn't notify Akamai before provisioning the domain through Salesforce, initial provisioning fails. The customer's move to the CDN is delayed as Akamai contacts the customer to validate the change.

SEE ALSO:

Add a Domain

Manage Domains and Custom URLs

Enable External HTTPS on a Domain

Set Up the Experience Cloud Content Delivery Network (CDN)

After you review the considerations and complete the prerequisites, set up an Experience Cloud Content Delivery Network (CDN) for your domain. This feature is available in Experience Builder and Salesforce Tabs and Visualforce sites.

Experience Cloud CDNs are supported in production environments. They aren't supported in Developer or Partner Developer editions because they don't support custom domains. They also aren't supported in sandbox environments.

Before you activate this feature, read the Considerations for Using a CDN for Your Experience Cloud Site on page 599 and complete the Experience Cloud CDN Prerequisites on page 601.

1. Prepare Your Domain
    a. From Setup, in the Quick Find box, enter `Digital Experiences`, and then select **Settings**. Select **Enable Experience Workspaces**. If enhanced domains aren't enabled in your org, specify a subdomain for your Experience Cloud sites. And Save your changes.
    b. Obtain a custom domain outside of Salesforce, and add it as a domain record to Salesforce.
    c. From Setup, in the Quick Find box, enter `Custom URLs`, and then select **Custom URLs**. Associate your custom domain to your site URL.
2. Provision and Activate the Experience Cloud CDN

    Note: To minimize disruptions to your users, provision and activate your Experience Cloud CDN when your site traffic is low.

    a. From Setup, in the Quick Find box, enter `Domains`, and then select **Domains**.
    b. Next to your custom domain, click **Edit** for your custom domain.
    c. Create the Siteforce.com CNAME requested at the top of the page by adding your new Custom Domain to the value provided. Additionally enter the TXT record required to provision a certificate when you select the single certificate option. You provide the values for Custom-Domain (for example, www.customer.com) and 18-Digit OrgID (for example, 00000000000zzzzzzz) to your DNS provider or IT department.

        The following list items can be copied and used:

        - First CNAME is: [custom-domain] TO [custom-domain].[18-digit OrgID].live.siteforce.com.
        - Second CNAME is: _acme-challenge.[custom-domain]. TO _acme-challenge.[custom-domain].[18-digit OrgID].live.siteforce.com.
    d. Select **Salesforce serves the domain over HTTPS, using a Salesforce content delivery network (CDN) partner**.

        Akamai is the CDN Partner.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

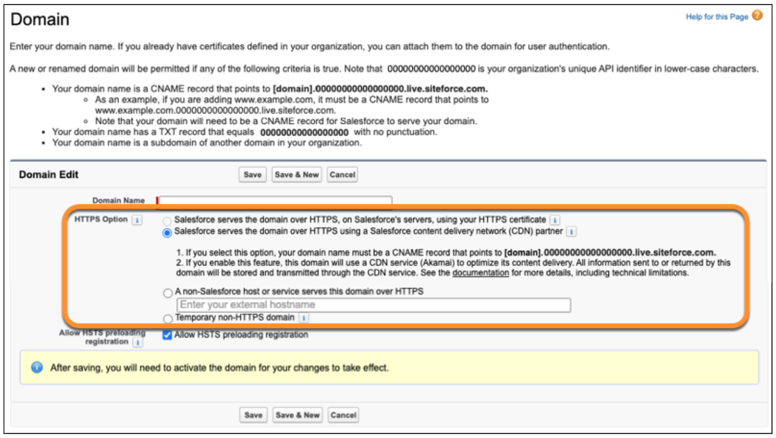
USER PERMISSIONS

To create an Experience Cloud site:
- Create and Set Up Experiences AND View Setup and Configuration

To customize an Experience Cloud site:
- Be a member of the site AND Create and Set Up Experiences
- OR
- Be a member of the site AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:
- Be a member of the site AND Create and Set Up Experiences
- OR
- Be a member of the site AND an experience admin or publisher in that site

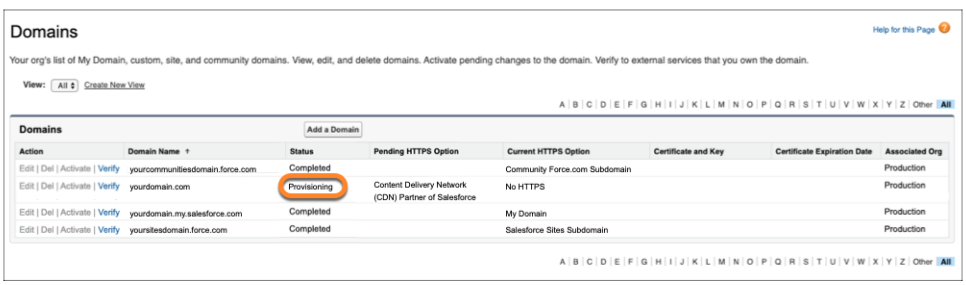
To edit a domain:
- Customize Application

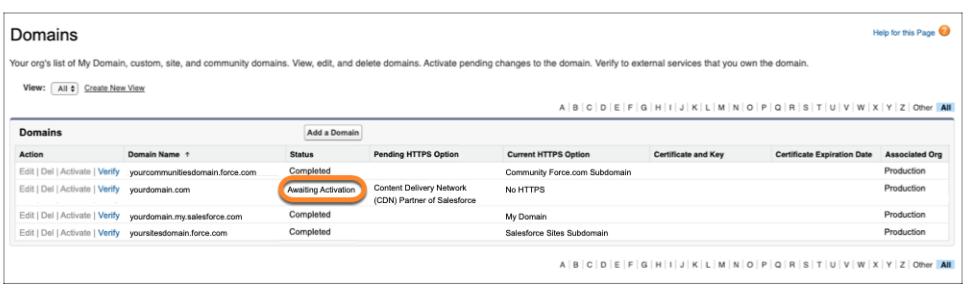


With this option, your domain uses a single certificate, which displays only one hostname. Ten branded certificates and 48 terabytes of traffic are available for Experience Cloud licenses that adopt single certificate CDNs. Contact your account representative if more certificates are needed.

e. Save your changes.

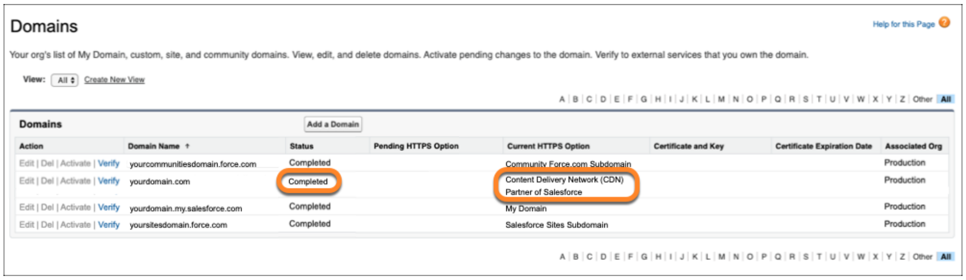
Experience Cloud CDN provisioning can take 4–12 hours. The Provisioning Status field changes from Provisioning to Awaiting Activation when complete. You receive an email status that it's complete. We don't expect downtime or disruption during provisioning.





f. Activate your domain.

Your site can be unavailable for 5–10 minutes, so provision and activate your Experience Cloud CDN when your site traffic is low. The Provisioning Status field changes from Awaiting Activation to Complete, and the Current HTTPS Option changes to CDN.



> **Note:** Changing the Experience Cloud CDN affects SAML Single Sign-On Settings for all custom URLs in that domain. Reconfirm the SAML Single Sign-On Settings for each HTTPS custom URL in that domain after activating a change. Login Settings are available in Experience Workspaces under Administration | Login & Registration.

Enable a Custom Domain

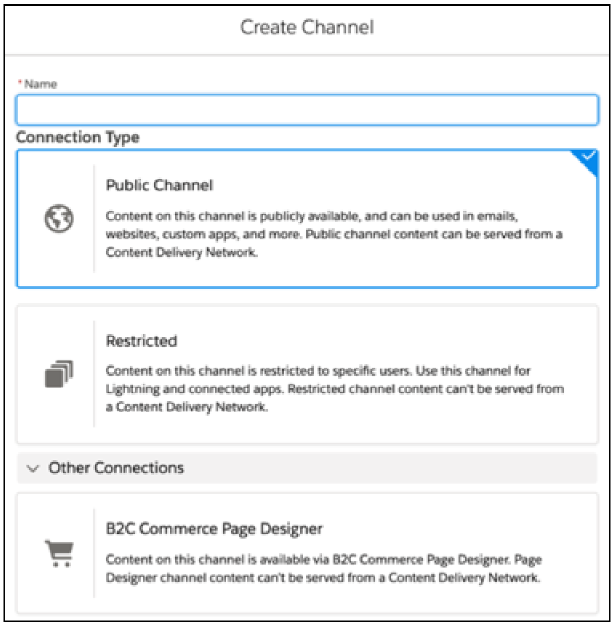
1. From Setup, in the Quick Find box, enter `Domains`, and then select **Domains**.
2. Next to your custom domain, click `Edit` for your custom domain.
3. Select an option other than **Salesforce serves the domain over HTTPS, using a Salesforce content delivery network (CDN) partner**, and then save your changes.
4. When the provisioning process is complete, activate your domain.

> **Note:** When you roll back within 24 hours of activating an Experience Cloud CDN, it's immediate. Rolling back more than 24 hours after activating a CDN can take 10–20 minutes. You can activate your custom domain when ready. Upon activation, visitors to your site can observe up to 5 minutes of the same transition-related issues that can occur while provisioning your Experience Cloud CDN.

Enable the Experience Cloud CDN for CMS

You can also use an Experience Cloud CDN to connect content to your sites and to custom applications through public channels. Follow these instructions to enable an Experience Cloud CDN within the CMS app:

1. Open the CMS Channels page in the Salesforce CMS app.
2. Click **Create Channel**.
3. Select **Public Channel**.



Now, you can link your domain to your public channel and share content.

1. On the CMS Channels page, click

   > **Edit** beside your public channel.
2. In the Channel Settings window, navigate to the Domain tab.
3. Here, you can configure a domain that links content from your public channel to your Experience Cloud CDN and seamlessly deliver content to your users.

Serve your content from a public channel using an Experience Cloud CDN for an interactive email design experience with Pardot Emails. You can use our CDN partner, Akamai, or one of your own. Then, select a public channel associated with a CMS workspace to source your images.

Note: To use CMS images with Pardot Emails, make sure you use Connected Campaigns and Handlebars Merge Language and enable Pardot through a verified Salesforce-Pardot Connector.

SEE ALSO:

View and Edit Single Sign-On Settings
Add a Domain
Manage Domains and Custom URLs
View and Edit Single Sign-On Settings
Add a Domain
Manage Domains and Custom URLs
Create a Custom Report Type

Content Delivery Network for Digital Experiences with Enhanced Domains

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

When you enable enhanced domains, the format of your Experience Cloud site URL changes from ExperienceCloudSitesSubdomainName.force.com to MyDomainName.my.site.com. Your *.my.site.com domain includes the Experience Cloud content delivery network (CDN). The CDN delivers faster experiences and helps maintain performance at scale. It minimizes delays in loading web page content by reducing the distance between the server and the user. It also increases the number of requests that the server can respond to, because the CDN offloads a large portion of hits to your site.

The Experience Cloud CDN reduces the page load time for your sites through Experience Cloud or to custom applications through public channels. All the assets to develop your Experience Cloud site, such as CSS files, JavaScript libraries, and images, are stored on your company's Salesforce instance. For example, if your Salesforce instance is on NA1, your server is in North America. The farther your users are from your Salesforce server, the longer it takes to get assets to their computer and your site's pages.

With the Experience Cloud CDN, your publicly cacheable assets are stored on servers around the world to deliver your content quickly and efficiently. Additionally, the CDN can provide availability features to your site, such as a declarative Service Not Available page if there's a regional issue. Without this feature, the system provides no feedback to your users when your Experience Cloud site is unavailable due to an outage on your Salesforce instance.

If you disable enhanced domains, your Experience Cloud site URL reverts to its previous ExperienceCloudSitesSubdomainName.force.com format, and it no longer uses the Experience Cloud CDN.

SEE ALSO:

Enhanced Domains

Experience Cloud Content Delivery Network (CDN) Traffic Allowances

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

Each byte of traffic that's requested on your custom domain, whether it's an image or a complex report, counts toward your content delivery network's (CDN) usage amount. The amount of traffic allowed over a CDN depends on the license that you've purchased. Understand how to monitor your Experience Cloud Content Delivery Network (CDN) usage and what happens if you exceed the Terabyte limit.

Experience Cloud CDNs are supported in production environments. They aren't supported in Developer or Partner Developer editions because they don't support custom domains. They also aren't supported in sandbox environments.

Traffic Allowances by License Type

Consider the following when you serve content to your sites with the Experience Cloud CDN:

- Users who have purchased Salesforce CMS, Commerce Apps, External Apps, or a Customer Community, Customer Community Plus, Partner Community license are entitled to 48 terabytes of traffic, 10 single branded domain certificates, and unlimited access to shared certificates.
- All other license users have access to 5 terabytes of traffic and unlimited access to shared certificates.

Contact your account representative to purchase additional terabytes if you require more traffic for your org. If you exceed the traffic allowance for your org, they'll contact you to discuss purchasing more terabytes to fit your business needs. If you run out of single certificates for your org, you can log a ticket with Salesforce Customer Support to request more.

- Experience Cloud users can purchase the additional terabytes needed for their org. Additional terabytes purchased for Experience Cloud users are added to the 48 terabytes provided.
- All other license users must purchase the total terabytes needed for their org. Additional terabytes aren't added on top of the 5 terabytes provided.

Note: We don't shut down your site or move you off the CDN if you exceed the traffic limit.

CDN Usage Reports

Manage your Experience Cloud CDN usage when you serve content to your sites.

You can use two reports to check your CDN usage. The CDN Usage report is part of the Experience Management Package found in AppExchange. You can also create a custom report type with Domains as the primary object.

Contact Salesforce Customer Support if you need help with managing your usage.

Improve Experience Cloud Site Performance with Browser Caching

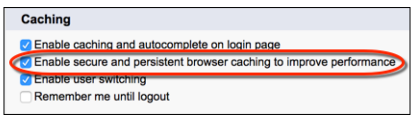
If you use many components in your Experience Builder site, you can improve your site's performance with browser caching. Performance is about the same for the first page load, but subsequent page loads are faster. The cache is encrypted and secure.

The **Enable secure and persistent browser caching to improve performance** setting enables browser caching of your site's Lightning components. It's enabled by default.

> **Note:** To cache your site's Visualforce pages on your end users' web browsers, disable the site-level setting: **Cache public Visualforce pages**. For more information on caching your site's Visualforce pages, see *Configure Site Caching* in Salesforce Help.

To verify that the **Enable secure and persistent browser caching to improve performance** setting is enabled:

1. From Setup, in the Quick Find box, enter `Session Settings`, and then select **Session Settings**.



SEE ALSO:

Configure Site Caching

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

Progressive Rendering Overview

Progressive Rendering prioritizes the display order of your page components. With proper planning and testing, it can improve display time performance and polish your site's experience to better engage customers.

Progressive Rendering improves the performance of your page by fetching and rendering page components in a parallel and prioritized manner. If you notice that your site pages take a long time to load before you see the components rendered on the screen, then progressive rendering can help improve your site's performance.

Assign one of three priorities to any top-level component.

EDITIONS

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

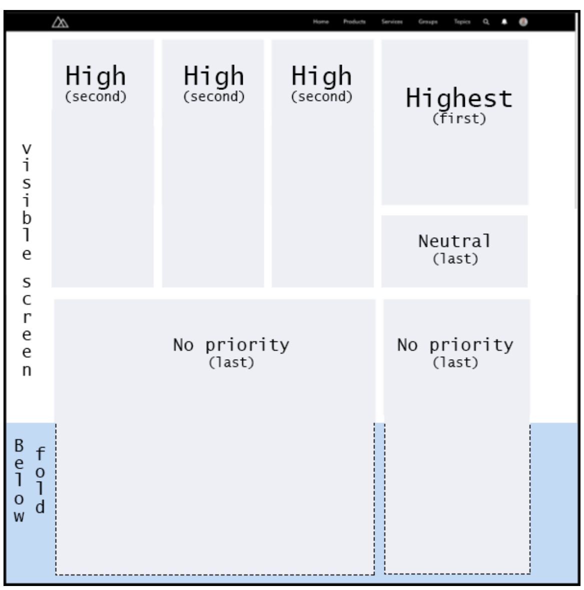
Table 3: Component Priority Levels

Priority	Description
Highest	Highest priority components are displayed first. This priority is recommended for key content that you want to display first or content that appears above the fold on longer pages.
High	High priority components are displayed after all components in the Highest group.
Neutral	Neutral priority components are displayed after all other components that have a higher priority. By default, all components begin with a Neutral priority.

Note: Only top-level components in the content area of your pages can have a priority. You can't assign a priority to a nested component.

As an example, assign **Highest** (first) to the few components that you want to be viewed first. Specify **High** (second) for those components that can load later without affecting your customer's experience. Unassigned components are treated as **Neutral** by default and are displayed last. There's no right choice for assignments, but a lack of planning can degrade performance and diminish positive experiences on your site.

For instance, sometimes you want a critical notice to appear first, prioritized as highest, and then fill in some of your highlighted content, prioritized as high. All other components, visible and below the fold, load after critical notices are rendered. Whether explicitly prioritized as neutral or not, they'retreated as neutral.



Note: All unassigned components are set to **Neutral** priority. For new sites, the default priorities for components can vary based on the site template.

Because Progressive Rendering requires careful planning and testing, it's off by default. Turn it on from the **Advanced** section of your Experience Builder Settings. Using this feature requires time and effort. But don't worry, we provide some ideas to help you get started in the Progressive Rendering Guidelines

So, what happens while Progressive Rendering is doing its thing? Your page layout is roughly rendered and then components are added in order of decreasing priority. Generally, this type of rendering doesn't cause any visual issues. However, sometimes components rearrange as the page displays, depending on which components you prioritized and how quickly it loads. That's another good reason to test, test, and retest when you decide to take advantage of this advanced feature.

Assign a priority to a component in the actions menu of the Property Editor.

Note: After you set the priorities, adding, deleting, or duplicating a component or changing themes or layouts doesn't change your priority settings, but it invalidates your assumptions and testing. To ensure that your choices remain effective, you can expect any changes made to kick off a new round of testing. We try to notify you when you make those kinds of changes, but you still have to do the testing. Always make testing a part of your change plan.

Turning off Progressive Rendering removes prioritized behavior, but your settings remain. If you turn on Progressive Rendering again later, the original priority settings go back into force. While the continuity makes testing easier, the results can surprise you if you don't watch for it.

SEE ALSO:

Salesforce Community Page Optimizer analyzer

Prioritize Component Display Order with Progressive Rendering

Assign Audiences to Components

Progressive Rendering Guidelines

EDITIONS

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

Here are some guidelines for how to get the most out of Progressive Rendering.

When is the best time to Progressive Rendering?

Not all Experience Cloud sites require this powerful feature, so don't rush to use it. However, when you need it, you really need it.

Progressive Rendering is designed to help improve the performance of your page by fetching and rendering page components in a parallel and prioritized manner. If you notice that your site pages take a long time to load before you see the components rendered on the screen, then progressive rendering can help improve your experience.

Use the Page Optimizer tool to determine if Progressive Rendering is a good choice for your site pages and to get suggestions on how to prioritize your components. It can also help you evaluate the performance impact of your configurations.

Note: Page Optimizer is available as a Chrome extension. You can read more about the tool in its documentation.

Finding the right configuration that works best for you both in terms of performance and user experience can take a few iterations of configuration and testing.

Which components are good candidates for prioritization?

Generally, it's probably best to have a few small (but important) components in the **Highest** group. However, trial and error testing and in-depth performance analysis are the best routes to figuring out how to best optimize your pages.

What happens while Progressive Rendering is doing its thing?

Your page layout is roughly rendered and then components are added in order of decreasing priority. Generally, this type of rendering doesn't cause any visual issues. However, sometimes components rearrange as the page displays, depending on which components you prioritized and how quickly it loads. That's another good reason to test, test, and retest when you decide to take advantage of this advanced feature.

When is the best time to revisit your priority settings?

After priorities are set, adding, deleting, or duplicating a component or changing themes or layouts potentially invalidates your currently set priorities. Any changes require you to review the display order to ensure it's still effective.

Test, test, test

Always test your pages after you change your priority settings. We made it easy to test the page with and without Progressive Rendering enabled. If you turn off the feature, your component priority settings are remembered, and they're reapplied when you turn it back on.

SEE ALSO:

Prioritize Component Display Order with Progressive Rendering
Salesforce Community Page Optimizer analyzer

Prioritize Component Display Order with Progressive Rendering

EDITIONS

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

USER PERMISSIONS

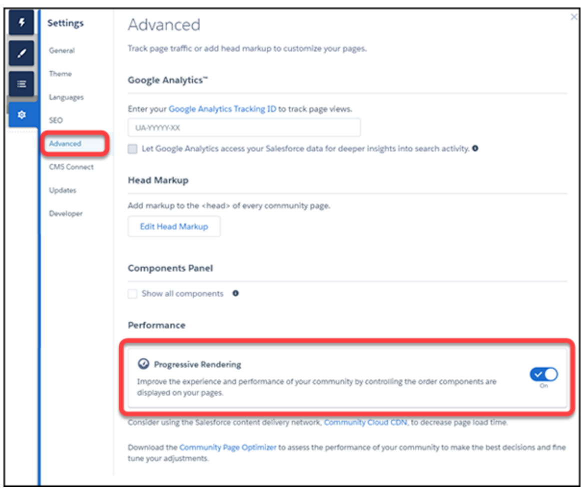
To enable Progressive Rendering and apply settings:
- Create and Set Up Communities

Quickly set the display order of components on your Experience Builder pages with Progressive Rendering. By carefully optimizing how your pages display, you can enhance the experience of your site and better engage your community.

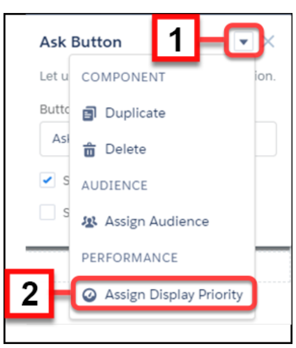
Before you activate this feature, read Component Prioritization Guidelines on page 611. Determine the need and value of using Progressive Rendering for your site.

Choose the components you want to load first and which can load later. Evaluating components is a combination of determining their computational load and their design and user impact. Good decisions require research, analysis, testing, and retesting. Consider working with other disciplines, such as usability experts, to ensure that you're evaluating all potential impacts.

1. In the Experience Builder Advanced settings, enable Progressive Rendering.



2. Select a component on the page.
3. From the actions menu (1) in the Property Editor, select **Assign Display Priority** (2).



4. Choose the appropriate priority, and click **Assign**.

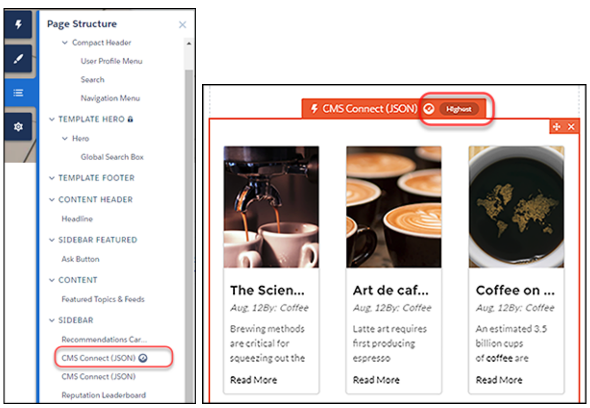
   There are three priority choices.

Table 4: Component Priority Levels

Priority	Description
Highest	Highest priority components are displayed first. This priority is recommended for key content that you want to display first or content that appears above the fold on longer pages.
High	High priority components are displayed after all components in the Highest group.
Neutral	Neutral priority components are displayed after all other components that have a higher priority. By default, all components begin with a Neutral priority.

After you select a priority, a color border and icon around the component indicates the priority that is assigned. An icon also appears by the component in the Page Structure panel. In addition, a banner is added to the page to remind you that there are components with priorities set on the page.

To change the priority later, select **Edit Display Priority** in the component menu, or click either of the priority icons displayed in the page structure menu or the component border.



To remove the priority entirely, select **Unassign Display Priority** in the component menu.

5. Test your results, and ensure that the experience is what you expect.

If you add new components or change the priorities of existing components, re-examine the priority choices on your page to ensure that they're still appropriate and working as intended.

SEE ALSO:

Progressive Rendering Guidelines

Salesforce Community Page Optimizer analyzer

Add Salesforce CMS Content to Your Experience Cloud Site

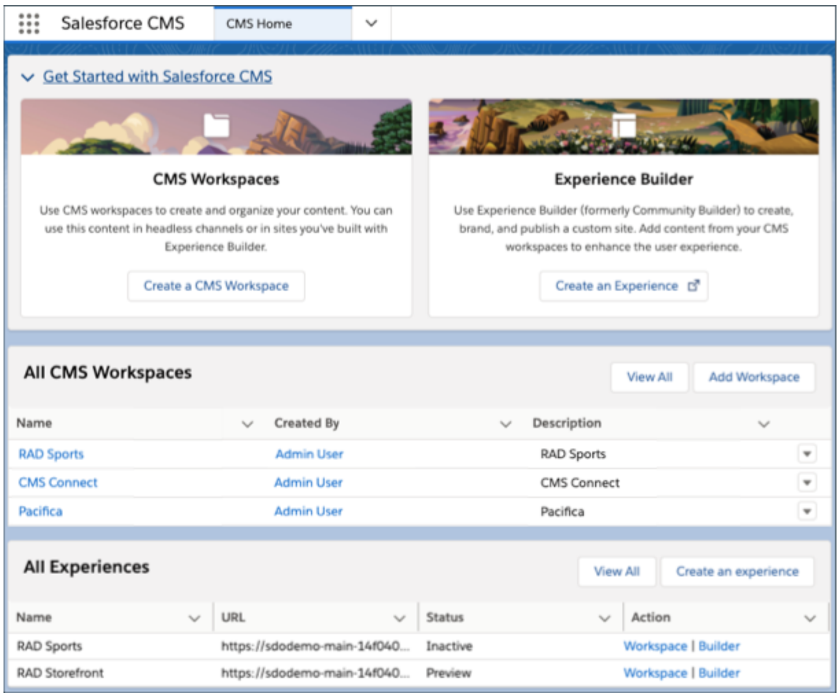
EDITIONS

Available in: Lightning Experience

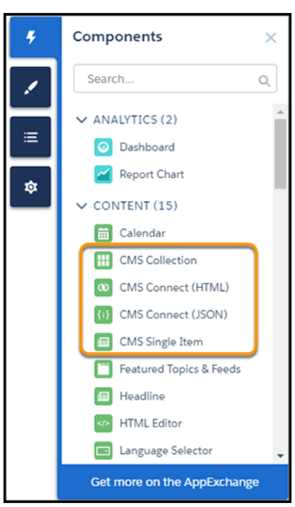
Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Salesforce CMS is a hybrid content management system that lets you create and manage content in a central location and then share that content across multiple channels, including Experience Builder sites. After you create content in the Salesforce CMS app, you can add the content to site pages so that your customers can see it.

In CMS Workspaces, you create content, define content access, and add channels that control where your content is shared.



In Experience Builder, you can organize and tag the shared content, and then add it to your site pages using CMS components. Your users see the content when the site is published.



See Salesforce CMS to learn more.

Connect Your External CMS to Your Experience Builder Site

Do you have a website built in an external content management system (CMS)? You can connect that CMS content to your Experience Builder site for consistent branding, reuse of material, and ease of maintenance.

What Is CMS Connect?

CMS Connect lets you embed assets from a third-party CMS in your Experience Builder site. You can connect CMS components, HTML, JSON, CSS, and JavaScript to customize your site and keep its branding consistent with your website. We support personalized content from Adobe Experience Manager (AEM) as well.

After you do some initial configuration work, CMS Connect makes maintenance a breeze, because your content renders dynamically on your site pages. CMS Connect is the smart way to display headers, footers, banners, blogs, articles, and other reused content in your site. We give you many configuration options including language mapping between your CMS and Salesforce, determining the load order of multiple connections, and specifying CSS scope.

Which CMS Providers Are Supported?

CMS Connect supports content from these CMS providers:

- Adobe Experience Manager
- Drupal
- SDL
- Sitecore
- WordPress

Note: If your CMS server is not one we officially support, CMS Connect can still work if you set it up properly. CMS Connect works with the HTML/CSS/HTTP standards and isn't provider-specific.

IN THIS SECTION:

Before Using CMS Connect

Ready to get your external CMS and your Experience Builder site connected? Before diving in, review these pointers and prerequisites so everything goes smoothly.

Create a CMS Connection

Create a connection between your content management system and your Experience Builder site so you can render headers, footers, banners, blogs, and other content on your site pages.

Edit a CMS Connection

You can edit a CMS connection that's already been set up in your site. For example, change the language mapping, or add CSS and JavaScript files.

Connect JSON Content from Your CMS to Your Experience Cloud Site

Does your website have JSON content such as blogs or articles? Do you store it in a CMS such as WordPress or Drupal? Sweet! You can render this content in your Experience Cloud site using CMS Connect.

Personalized Content in CMS Connect

If Adobe Experience Manager (AEM) is your CMS and your content is personalized, you can connect your personalized content to your site using CMS Connect.

Change the Load Order of CMS Connections

If your site has multiple CMS connections, you can decide the order in which they're loaded. The load order mostly affects any CSS and JavaScript in your connections. Consider their dependencies on each other, and set the load order accordingly.

Before Using CMS Connect

Ready to get your external CMS and your Experience Builder site connected? Before diving in, review these pointers and prerequisites so everything goes smoothly.

Confirm Your HTTP Server Serves Fragments

CMS Connect requires an HTTP server that can serve HTML fragments, either static or rendered on demand. Fragments can include headers, footers, components, CSS, or JavaScript.

Confirm All URLs in CSS and JavaScript Are Absolute

URLs in CSS and JavaScript must be absolute. Relative URLs in HTML are OK and are converted for you. CMS Connect appends host names and converts relative URLs to absolute URLs in the following HTML tags and attributes:

- `<img>` tag `src` attribute
- `<audio>` tag `src` attribute
- `<input>` tag
- `<button>` tag `formaction` attribute
- `<video>` tag `src` and `poster` attributes
- `<a>` and `<area>` tags `href` attribute
- `<form>` tag `action` attribute
- `<del>`, `<ins>`, `<blockquote>`, and `<q>` tags `cite` attribute
- `<script>` tag `src` attribute

Confirm Your Site Host Is a Trusted Host in the Cross-Origin Resource Sharing (CORS) Header

CMS Connect uses CORS to access external content. Make sure to add site Host (both production and preview URLs) to the list of trusted hosts in the CORS header in your CMS system.

CORS is a web standard for accessing web resources on different domains. CORS is a required technology to connect your CMS to Salesforce. It's a technique for relaxing the same-origin policy, allowing JavaScript on a web page to consume a REST API served from a different origin. CORS allows JavaScript to pass data to the servers at Salesforce using CMS Connect.

To enable CORS in development environments, we recommend using a Chrome plugin. For production environments, refer to your CMS documentation on enabling CORS.

Note: For more information about CORS, see https://developer.mozilla.org/en-US/docs/Web/HTTP/Access_control_CORS.

The domains that you allowlist are unique to your org and differ depending on whether you've implemented My Domain. However, the domains do follow a general set of patterns.

Orgs with My Domain enabled

Note: If enhanced domains are enabled in your org, your URLs are different. If enhanced domains aren't enabled, the Stabilize URLs in Visualforce, Experience Builder, Site.com studio, and content files My Domain setting also affects this format. For details, see My Domain URL Formats in Salesforce Help.

Domain	URL Pattern
Builder Preview (Production)	***MyDomainName***`--sitepreview.`***InstanceName***`.force.com`
Builder Live Preview (Production)	***MyDomainName***`--livepreview.`***InstanceName***`.force.com`
Builder Preview (Sandbox)	***MyDomainName***`--`***SandboxName***`--sitepreview.`***InstanceName***`.force.com`
Builder Live Preview (Sandbox)	***MyDomainName***`--`***SandboxName***`--livepreview.`***InstanceName***`.force.com`

Orgs without My Domain enabled

Domain	URL Pattern
Builder Preview (Production)	***ExperienceCloudSitesSubdomainName***`--preview.`***InstanceName***`.force.com`
Builder Live Preview (Production)	***ExperienceCloudSitesSubdomainName***`--livepreview.`***InstanceName***`.force.com`
Builder Preview (Sandbox)	***SandboxName-ExperienceCloudSitesSubdomainName***`--preview.`***InstanceName***`.force.com`
Builder Live Preview (Sandbox)	***SandboxName-ExperienceCloudSitesSubdomainName***`--livepreview.`***InstanceName***`.force.com`

Confirm External Hosts Are Allowlisted

Content Security Policy (CSP) requires external hosts to be allowlisted appropriately. Script resources, such as JavaScript, must be allowlisted in the Security settings of Builder. Non-script resources, such as images and css, must be allowlisted in CSP Trusted Sites in your Salesforce org settings. CMS Connect attempts to allowlist hosts it's aware of for you, but links in imported content, for instance, wouldn't be captured by that process.

Note: CMS Connect (JSON) connections that use authenticated sources work only for authenticated users in your site.

Confirm All Tags in Use Are Supported

CMS Connect filters out the same HTML tags that Lightning Locker and Lightning Components do. Avoid surprises by familiarizing yourself with the unsupported tags. See Add Markup to the Page <head> to Customize Your Experience Builder Site for a list of supported tags.

Confirm Your File MIME Types Are Supported

Only the following MIME types are supported.

- CONTENT_TYPES_HTML: 'text/html'

- CONTENT_TYPES_JS: 'application/javascript'
- CONTENT_TYPES_JSON: 'application/json'

Confirm All CMS Servers Are Accessible via Unauthenticated HTTPS (HTTP over SSL)

All CMS servers you connect must be accessible via unauthenticated HTTPS (HTTP over SSL) to retrieve HTML and JavaScript. When you set up a CMS connection, the server URL you enter must start with HTTPS. HTTPS ensures all web communications that are required remain private. An SSL certificate is required for unauthenticated HTTPS for all traffic between your servers and Salesforce.

Confirm All JavaScript and CSS Are from the Same Source as the ReferencedHTML

All JavaScript and CSS files referenced by your HTML must point to your CMS source.

Confirm Experience Workspaces Is Enabled

To use CMS Connect, you must have Experience Workspaces enabled in your site Settings. Make sure **Enable Experience Workspaces** is selected in **Setup** > **Site Settings**.

Confirm the CMS Connect Org Perm Is On

CMS Connect is controlled by an org permission that is turned on by default. If you're not seeing CMS Connect in your Experience Workspaces, it's possible that the permission is turned off. You can ask Salesforce Customer Support to turn it back on for you.

SEE ALSO:

CSP and Lightning Locker in Experience Builder Sites

My Domain Overview

My Domain URL Formats

Create a CMS Connection

Create a connection between your content management system and your Experience Builder site so you can render headers, footers, banners, blogs, and other content on your site pages.

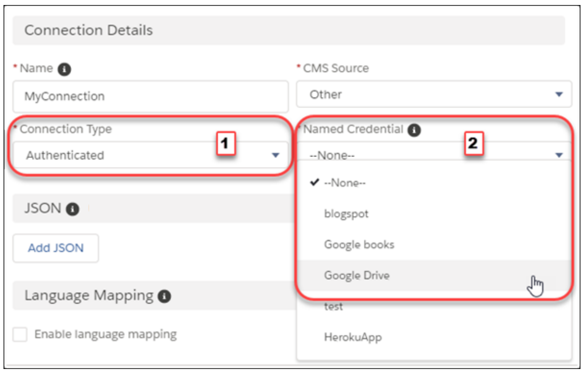
Before you begin:

- Before you connect to CMS, read Before Using CMS Connect.
- If you're setting up an authenticated connection, create named credentials in your Salesforce settings. Both anonymous and named principal protocols are supported. See Define a Named Credential.

1. Open Experience Workspaces.
2. Click **Content Management**.
3. Select **CMS Connect**.
4. Click **Add CMS Connection** (if none exist) or **New**.
5. In the Connection Details form, enter a friendly name for the connection.
   The name shows up in your CMS workspace and other internal areas. Based on the name you enter, an API name is created for the connection.
6. Select your CMS source: AEM, Drupal, SDL, Sitecore, WordPress, or Other.

Note: If your CMS server isn't listed, select **Other**. CMS Connect works with HTML, CSS, and HTTP standards and isn't provider-specific.

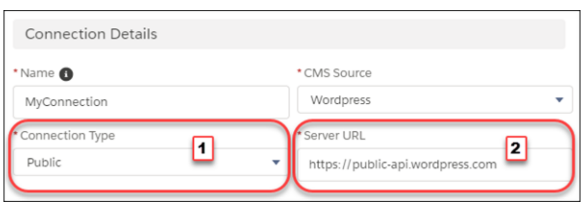
7. Select a connection type.
   - To create an authenticated connection, select **Authenticated** (1) and select a named credential (2) that you defined previously to authenticate the connection to your external system. Authenticated connection types only work with JSON content.



   Then, go to step 12.

   - To create a public connection, select **Public** (1) and enter a server URL (2).

   Enter the full path to a CMS server that's accessible using HTTPS and use a fully qualified domain name, such as `https://www.example.com`. Public connection types work with all connection methods.



   Then, go to step 8.

   Note: If your Content Security Policy is set to:

CSP Setting	Description
Strict CSP	You receive a warning that the source may not work. Test your connection to determine if you need to choose a different CSP option for your site to use CMS Connect.
Relaxed CSP	The new URL is automatically added to the CSP Trusted Sites for your org. – The new listing is named the same as the CMS connection, with a context of Experience Cloud site. – If the URL is already in your list, no additional entry is made. – If the name of the CSP Trusted Site is already taken, it's made unique by appending a number (1, 2, 3, and so on).

CSP Setting	Description
	– If you experience issues when testing your site, confirm the necessary URLs are in CSP Trusted Sites and try again. Content from external sources may contain other URLs that need to be allowlisted to work properly.

8. For an HTML connection, enter the root path to the directory that your CMS content is in. The path is the relative path from your server URL. You can include placeholders for language and component. For example, here's an example root path to content in AEM.

   `content/mywebsite/{language}/{component}`

   Note: You use the `{language}` placeholder only when you enable language mapping and add at least one language.

9. If your CMS source is AEM and your HTML content is set up with personalization, you can use that personalized content in your site. To do that, enable **Use Personalization**. See Enable Personalization for a CMS Connection.

   Note: To use personalization in Experience Builder, enable it for the components that you want to personalize. For the header and footer, go to **Settings** > **CSM Connect**. For other components, use the component's property editor.

10. To link to a CSS style sheet, click **Add CSS** and enter the URL to your CSS file. Repeat for other style sheets. If your CSS is scoped, you can specify it in the Scope field.

    Style sheets load in the order listed.

11. To link to a JavaScript file, click **Add Script** and enter the URL to your JavaScript file. Repeat for other files.

    Scripts load in the order listed.

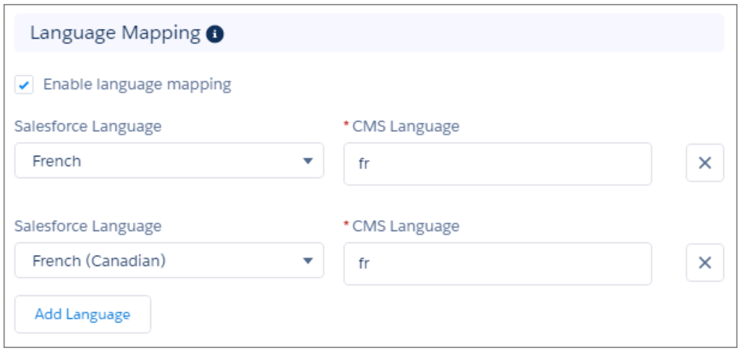
12. To connect JSON content such as blogs, click **Add JSON** and enter a name, type, and path for each JSON component you want to add. See Connect JSON Content from Your CMS to Your Experience Cloud Site.

13. If your content has multiple languages, select **Enable language mapping**, choose the Salesforce language, and for CMS Language, enter the directory name of your language folder from the source.

    For example, to map English, enter the directory name of your English language folder from AEM, such as `en`.

    To add more languages, click **Add Language**. For each language that you add from your CMS, make sure it's enabled in your Builder Settings.

    If you want to map languages from your site that you don't have in your CMS, you can define which language to use for the CMS content. For example, if your site has French and French Canadian enabled, you can set it up so that the French Canadian site displays French content.



14. Click **Save**.

    CMS Connect attempts to allowlist external hosts as appropriate, either in CSP Trusted Sites or in the Experience Builder Security settings. External hosts referenced by material pulled into your site, such as extra images or scripts in an external post, aren't allowlisted automatically and may require you to do so manually.

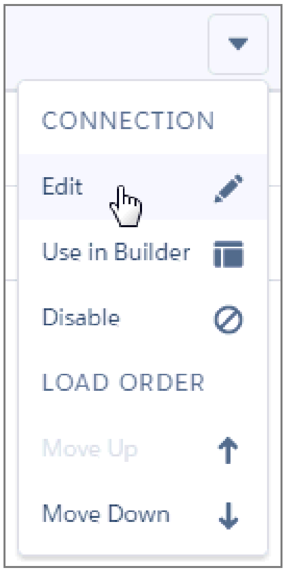
SEE ALSO:

CSP and Lightning Locker in Experience Builder Sites
Create CSP Trusted Sites to Access Third-Party APIs
Reuse Content with CMS Connect JSON
Set Up a Connection for Your JSON CMS
Example: Connect JSON Content to Your Experience Builder Site

Edit a CMS Connection

You can edit a CMS connection that's already been set up in your site. For example, change the language mapping, or add CSS and JavaScript files.

1. Open Experience Workspaces.
2. Click **CMS Connect**.
3. Click for the connection you want to edit. Choose **Edit**.



4. Make changes as needed. See Create a CMS Connection on page 618 for details.
5. Click **Save**.

SEE ALSO:

Set Up a Connection for Your JSON CMS

Connect JSON Content from Your CMS to Your Experience Cloud Site

Does your website have JSON content such as blogs or articles? Do you store it in a CMS such as WordPress or Drupal? Sweet! You can render this content in your Experience Cloud site using CMS Connect.

CMS Connect supports two basic types of JSON content. What they're called in your CMS could be different than what another CMS calls them. To keep things simple in CMS Connect, we call them **Content Item** and **Content List**.

An example of a content item is a single blog post. When it displays on a page, it's the full blog post, not just a blurb about it. A content list is a grouping of items such as blog posts. Most often, each item in a content list contains a link to those items. When setting up paths to your JSON content in a CMS connection, specify the type for each one: content item or content list.

Note: CMS Connect (JSON) connections that use authenticated sources work only for authenticated users in your site.

Set Up JSON in a CMS Connection

1. When creating or editing a CMS connection, in the JSON section, click **Add JSON**.
2. Enter a content type name. For example, `Home Improvement Blogs`.
3. Select the type of content to add.

   Content Item

   Use for a single article or blog post, such as `DIY Dryer Vent Cleaning`.

   Content List

   Use for a grouping of items, such as DIY Featured Blogs, that has links to individual blog posts.

4. Enter the path to the JSON component in your CMS. For a content list, also enter the starting node in the Node Path field.
5. To add more JSON, repeat these steps for each content item or content list.
6. Click **Save**.

Add JSON Components to Your Experience Cloud Site Pages

1. In Experience Builder, from the Components panel, drag the **CMS Connect (JSON)** component onto the page where you want the JSON content to display.
2. To display properties, select the component.
3. In the property editor, select the CMS source that contains your JSON content.
4. Select the name of the JSON content to use.
5. Enter the component path. The path is optional for content lists and required for content items.
6. The remaining settings vary based on whether you're displaying a content item or content list. See CMS Connect (JSON) in the components reference for details.

Get Analytics on the Material Brought in by CMS Connect (JSON)

Remember, the content you display in your site when using CMS Connect (JSON) doesn't live in your site. Getting usage data requires a few extra steps.

For instance, if you want to track the number of clicks on a blog card, from a JSON content list, or the number of page views, use Google Analytics™ for Salesforce Communities Package on page 800.

<p>Page Views based on User Type can also be added in Page Views by User Type Report on page 807.

Configure External Objects for the data that you're interested in tracking using Salesforce Connect or OData, Salesforce Reporting.

SEE ALSO:

Reuse Content with CMS Connect JSON

Set Up a Connection for Your JSON CMS

Add CMS Connect (JSON) Components to Your Experience Builder Pages

Example: Connect JSON Content to Your Experience Builder Site

CSP and Lightning Locker in Experience Builder Sites

Personalized Content in CMS Connect

If Adobe Experience Manager (AEM) is your CMS and your content is personalized, you can connect your personalized content to your site using CMS Connect.

Personalization in CMS Connect lets you keep the branding and other content consistent between your Experience Cloud site and your website. If you've gone to all the work of setting up personalization in AEM, make the most of that effort by rendering your personalized content in your site. Display content according to different segments, based on criteria such as geolocation or language.

Connecting your AEM content personalized with Client Context requires creating a connector page and installing it in AEM. The connector page is a JSP file that contains the logic of your website's personalization mapping. You might need to make a few tweaks to it, depending on how you want to run scripts. Then provide the path to this connector page in AEM when you're setting up the CMS connection in your community. That's where you can also add a path to your JavaScript file if you want to run scripts dynamically.

With personalization enabled, when a visitor views your site, we send client context information about the visitor such as IP address and geolocation. The logic in the connector page computes and returns a personalized URL for the content, which the visitor then sees.

After setting up personalization in your connection, enable it for each component you want to personalize.

IN THIS SECTION:

Enable Personalization for a CMS Connection

To use the personalization feature of Adobe Experience Manager (AEM) in Experience Cloud sites, you must first enable it for CMS Connect.

1. When creating or editing a CMS connection, in the HTML section, select **Use Personalization**.
2. In the Connector Page Path field, enter the path to the JSP file that you created and installed in AEM. This file contains the logic of your personalization mapping.
3. To run scripts dynamically, provide the path to your JavaScript file in the Script Path field.
4. Click **Save**.

Personalize Your Components in CMS Connect

Use Adobe Experience Manager (AEM) personalization to maintain branding in your site components.

1. In Experience Builder, go to the page that contains a CMS Connect (HTML) component you want to personalize.
2. Select the component to display its properties.
3. In the property editor, enable **Use Personalization**. You see this setting only if your CMS source is AEM and personalization is enabled for your connection.

Personalize Header and Footer Content in CMS Connect

Use Adobe Experience Manager (AEM) personalization to maintain branding in your site header and footer.

To personalize a header and footer.

1. From Experience Builder, go to Settings.
2. Select **CMS Connect**.
3. Select **Use Personalization** next to the header, footer, or both.

> Note: If the **Use Personalization** option is unavailable, it likely means that personalization isn't enabled for the CMS connection. Enable it in your connection settings first.

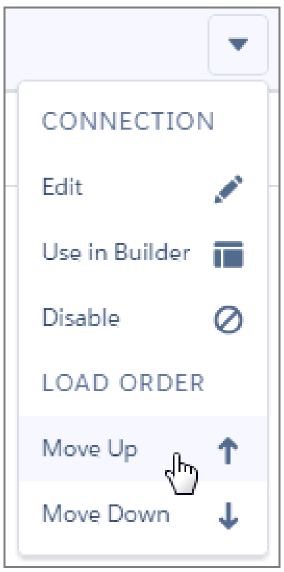
Change the Load Order of CMS Connections

If your site has multiple CMS connections, you can decide the order in which they're loaded. The load order mostly affects any CSS and JavaScript in your connections. Consider their dependencies on each other, and set the load order accordingly.

For example, suppose one of your connections has the JavaScript library jquery, and another connection relies on jquery. Set the connection with jquery to load first so that the other connection can also load.

Header and footer always render first regardless of the load order of your connections.

1. Open Experience Workspaces.
2. Click **CMS Connect**.
3. Click  for the connection you want to reorder.
4. Choose **Move Up** or **Move Down**.



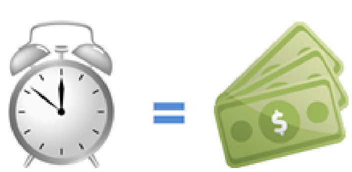
Lightning Bolt for Salesforce: Build Once, Then Distribute and Reuse

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

Lightning Bolt for Salesforce lets you quickly build and distribute industry-specific Lightning Bolt Solutions to jump-start new org capabilities. Save time by building once and then reusing. Whether it's for your own org or you're a consulting partner or ISV, you can reduce the time required to implement solutions and cut development costs.



A Lightning Bolt Solution is a portable package that's packed with power. It can combine custom Lightning apps, business process flows, and Experience Builder templates and pages in an easy-to-build and distributable form. Use a Lightning Bolt Solution to share or sell a solution on AppExchange, implement an Experience Builder site with a turnkey solution or new look, or configure automation. You can publish apps or flows without an Experience Builder template or include one when you want to apply your brand.

A Lightning Bolt Solution combines one or more of the following:

- Customized Experience Builder templates—A template includes a theme layout and CSS, along with pages, content layouts, and Lightning components. Alternatively, instead of a full template, you can also export a single Experience Builder page with its content layout and components.
- Flow categories—A flow category contains one or more flows, making it easy to group flows for related business processes.
- Custom apps—Adding customized apps lets you create solutions tailored to your industry.

Lightning Bolt Solutions are flexible, so you can take advantage of them in many ways. Here are just a few examples.

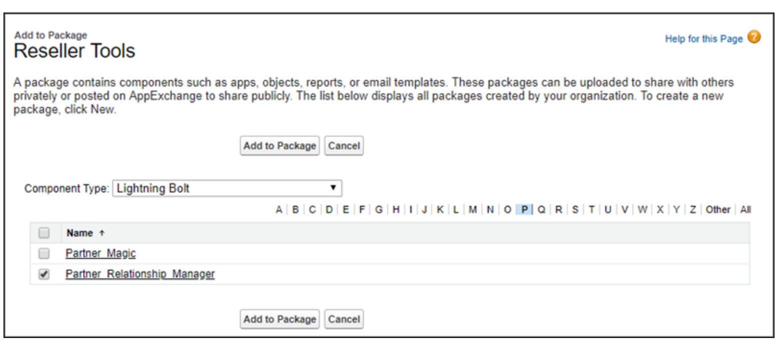
Example: You've customized the Partner Central template to create an Experience Builder site with features that meet your particular business needs. You want to create several similar partner sites, but you don't want to build each one from scratch. By exporting your customized template, you can reuse it and build as many branded sites as you need.

Example: You're a consulting partner who specializes in creating solutions for the real estate industry. Your solutions feature a unique look, custom apps for finding mortgages, and automation that alerts sales people of properties with active prospects. With a Lightning Bolt Solution, you can create and export your solution in a way that's easy to use. After you install your Lightning Bolt Solution in the customer's org, you can further customize it to suit their needs. By building the bulk of the solution in your org and then distributing it to your customers, you can rapidly launch new solutions.

Example: You're an ISV who builds a custom insurance agent app. The app includes automation to create coverage estimates and automatically notify customers of the results. Using a Lightning Bolt Solution, you can easily bundle your app and business process flows into a single package. Distribute the package to your customers to install in their Salesforce orgs, or market the solution on AppExchange.

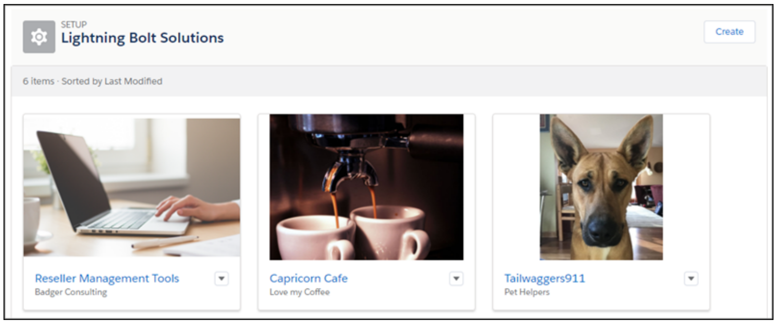
Package and Distribute Your Solution

You can package and distribute solutions to use in other orgs and sites. After you create and upload a package, share the link privately with your clients, customers, or partners. Alternatively, publish your custom Lightning Bolt Solution as a managed package in AppExchange. Market your solution with an AppExchange listing in the same way that you list any other app, component, or consulting service. Describe your solution, pricing, support, and other details so that customers can determine whether your offering is right for them.



Reuse Your Own Solution

When you create a solution, it appears in the list of Lightning Bolt Solutions in your org. You can use it to build new Experience Builder sites or enhance an existing one.



IN THIS SECTION:

Create a Lightning Bolt Solution

Have at least one Experience Builder template, custom app, or flow category that you want to distribute? Then you're ready to create a Lightning Bolt Solution. WithLightning Bolt Solutions, you can combine custom Lightning apps, business process flows, and Experience Builder templates and pages in easy-to-build, distributable packages.

Export a Customized Experience Builder Template in a Lightning Bolt Solution

You can customize and export an Experience Builder template to use as a base for creating Experience Builder sites. Create custom pages, layouts, and components. Export and package the template on its own or distribute it for others to use as a part of a Lightning Bolt Solution.

Export a Customized Experience Builder Theme in a Lightning Bolt Solution

Export themes that you've customized and use them in your own Experience Builder sites, or package and distribute them for others to use.

Export a Customized Experience Builder Page in a Lightning Bolt Solution

Export pages that you've customized in an Experience Builder site. Use them as a base for new pages, or package and distribute them for others to use in their sites.

Add Flows to a Lightning Bolt Solution

When you want to add flows to a Lightning Bolt Solution, group them into a flow category. Then add one or more flow categories to your solution.

Export and Packaging Considerations for Lightning Bolt Solutions

Before you export and package a Lightning Bolt Solution, keep the following considerations and limitations in mind.

Requirements for Distributing Lightning Bolt Solutions

Before Salesforce can recognize a Lightning Bolt Solution that's ready for distribution on AppExchange, your solution must meet certain requirements.

Package and Distribute a Lightning Bolt Solution

After you create a Lightning Bolt Solution, package the solution to distribute it to other users or orgs. You can upload the package to AppExchange to share or sell your solution.

SEE ALSO:

Salesforce Partner Community: Lightning Bolt for Partners

Lightning Aura Components Developer Guide

Experience Cloud Developer Guide

ISVforce Guide

Security Developer Center

Package and Distribute Your Apps

Create a Lightning Bolt Solution

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To create a flow category:
- Customize Application

To create a Lightning Bolt Solution without an Experience Builder template:
- Customize Application AND View Setup and Configuration

To create a Lightning Bolt Solution with an Experience Builder template:
- Customize Application AND Create and Set Up Experiences AND View Setup and Configuration

Have at least one Experience Builder template, custom app, or flow category that you want to distribute? Then you're ready to create a Lightning Bolt Solution. WithLightning Bolt Solutions, you can combine custom Lightning apps, business process flows, and Experience Builder templates and pages in easy-to-build, distributable packages.

Including an Experience Builder template in your Lightning Bolt Solution is optional. Use any template as a base to build your custom site with standard pages and components, or create custom pages, layouts, and components of your own. After you finish customizing the template, export it or one of its pages from **Settings** > **Developer** in Experience Builder.

To include flows, first create a flow category, and add the active flows that you want to export.

1. From Setup, enter `Lightning Bolt Solutions` in the Quick Find box, and select **Lightning Bolt Solutions**.
2. On the Details and Branding page, enter information about your solution. For example, enter your company and solution names, and list the solution's key features. Click **Next**.
3. On the Solution Highlights page, add any combination of Experience Builder templates, flow categories, and custom apps. Click **Next**.
4. Review the Summary page, and click **Finish**.
   The new Lightning Bolt Solutions is now ready for distribution.

SEE ALSO:

Add Flows to a Lightning Bolt Solution

Export a Customized Experience Builder Template in a Lightning Bolt Solution

Export a Customized Experience Builder Page in a Lightning Bolt Solution

Package and Distribute a Lightning Bolt Solution

Export a Customized Experience Builder Template in a Lightning Bolt Solution

USER PERMISSIONS

To create an Experience Cloud site:	Create and Set Up Experiences AND View Setup and Configuration
To customize an Experience Cloud site:	• Be a member of the site AND Create and Set Up Experiences OR • Be a member of the site AND an experience admin, publisher, or builder in that site
To publish an Experience Cloud site:	• Be a member of the site AND Create and Set Up Experiences OR • Be a member of the site AND an experience admin or publisher in that site
To create a Lightning Bolt Solution with an Experience Builder template or page:	Customize Application AND Create and Set Up Experiences AND View Setup and Configuration

EDITIONS

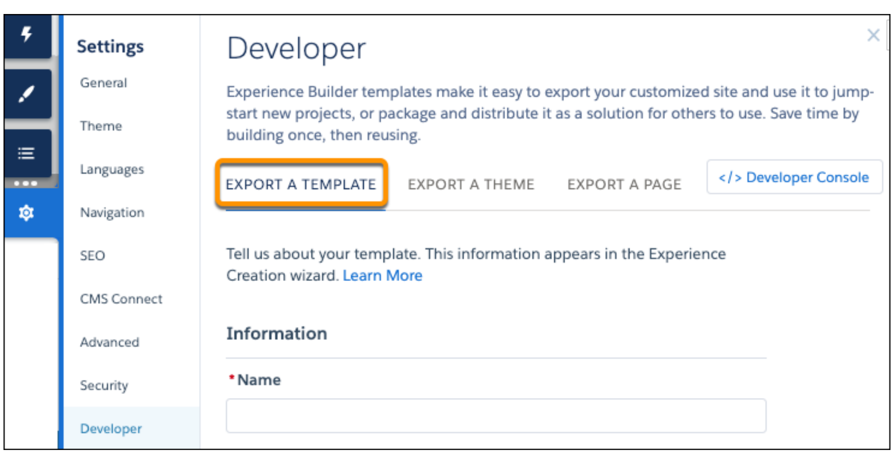
Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

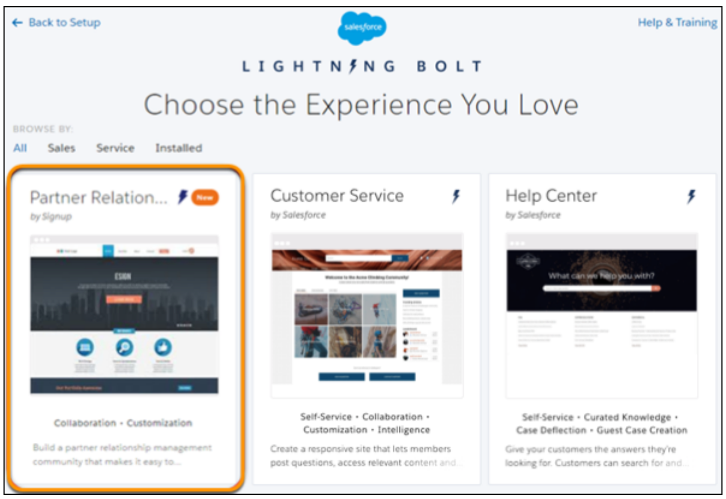
You can customize and export an Experience Builder template to use as a base for creating Experience Builder sites. Create custom pages, layouts, and components. Export and package the template on its own or distribute it for others to use as a part of a Lightning Bolt Solution.

Note: If your customized template isn't based on the latest version, you can't export it until you update the template.

1. In Experience Builder, select **Settings** > **Developer**, and click **Export a Template**.
   The information that you add on this page appears in the Experience Creation wizard and helps others understand your template's purpose and benefits.



2. Add a unique template name, a publisher name, and select a category.
3. Add at least one image as the thumbnail image. The recommended image dimensions are 1260 x 820 pixels.
   You can add two more images that appear in the detailed description of the template.
4. Enter a summary that describes the purpose of the template.
5. Enter at least one key feature.
   The feature titles appear under the thumbnail in the Experience Creation wizard. The feature descriptions appear in the solution's detailed description.
6. Click **Export**.
   After you export the template, it appears in the Experience Creation wizard in your org. You can then use it as a base for building new Experience Builder sites. If you package the template in a Lightning Bolt Solution and install it in another org, it appears in that org's Experience Creation wizard.



7. To distribute the template as a Lightning Bolt Solution, create a managed package.

To delete an exported or imported template, from Setup, in the Quick Find box, enter `Digital Experiences`, and then click **Templates**.

Note:

- If you create an Experience Builder site in your org that's based on an imported or exported template, you can't delete the template.
- If you include object pages in a custom template, you can't delete the object from your org unless you remove the template's object pages.
- If you add subpages to an Experience Builder site in your org and export the template, the new site doesn't have the same page hierarchy as the original. All pages in the exported site are found at the top level.

SEE ALSO:

Export and Packaging Considerations for Lightning Bolt Solutions

Package and Distribute Your Apps

ISVforce Guide: Creating and Uploading a Managed Package

Export a Customized Experience Builder Theme in a Lightning Bolt Solution

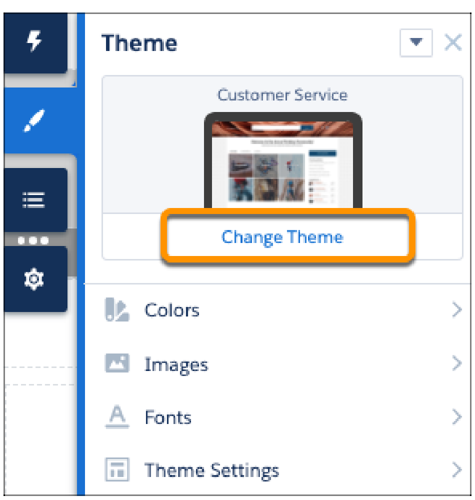
USER PERMISSIONS	
To create an Experience Cloud site:	Create and Set Up Experiences AND View Setup and Configuration
To customize an Experience Cloud site:	• Be a member of the site AND Create and Set Up Experiences OR • Be a member of the site AND an experience admin, publisher, or builder in that site
To publish an Experience Cloud site:	• Be a member of the site AND Create and Set Up Experiences OR • Be a member of the site AND an experience admin or publisher in that site
To create a Lightning Bolt Solution with an Experience Builder template or page:	Customize Application AND Create and Set Up Experiences AND View Setup and Configuration

EDITIONS
Available in: Salesforce Classic (not available in all orgs) and Lightning Experience
Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

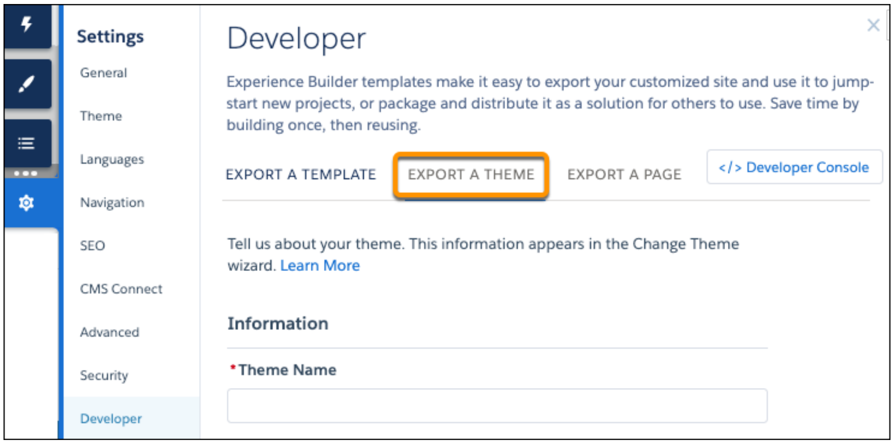
Export themes that you've customized and use them in your own Experience Builder sites, or package and distribute them for others to use.

Note: If your customized theme isn't based on the latest template version, you can't export it until you update the template.

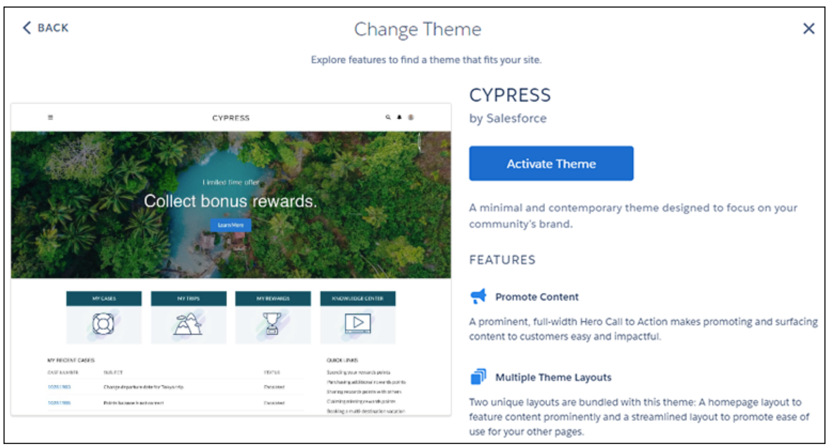
1. In Experience Builder, change to the theme you want to export if that isn't your active theme.



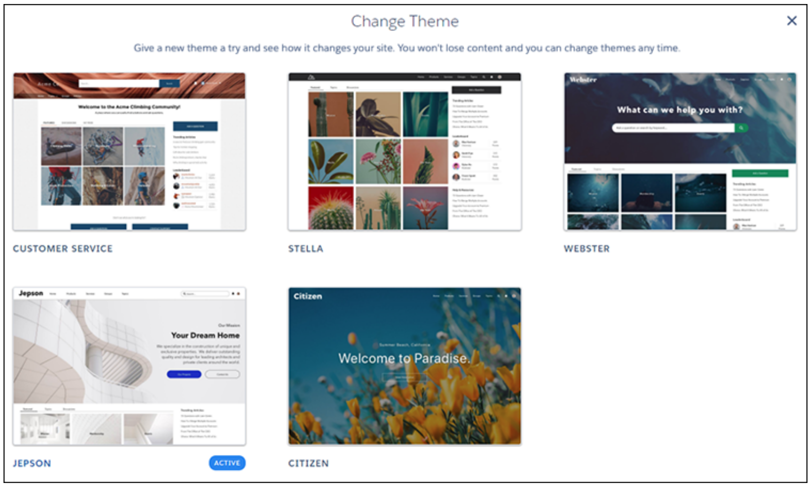
2. Select **Settings** > **Developer**, and click **Export a Theme**.



3. Fill in the form with the needed elements for the Change Theme detail page. Clear information and images help you and others understand what is in the theme and how it works.



4. Click **Export**.
After you export a theme, it appears in the Change Theme dialog box in all the Experience Builder sites in your org. If you package the theme and install it in another org, it appears in that org's Change Theme dialog box. Themes are ordered by how new they are, so a newly imported theme appears at the beginning of the list.



5. To distribute your theme, create a managed package. Or add the theme to a Lightning Bolt Solution, and include it in the package.

To delete an imported or exported theme, from Setup, enter `Digital Experiences` in the Quick Find box, and click **Themes**.

Note: If an Experience Builder site in your org is using the theme, you can't delete the theme until you switch to a different one.

Export a Customized Experience Builder Page in a Lightning Bolt Solution

USER PERMISSIONS

To create an Experience Cloud site:	Create and Set Up Experiences AND View Setup and Configuration
To customize an Experience Cloud site:	• Be a member of the site AND Create and Set Up Experiences OR • Be a member of the site AND an experience admin, publisher, or builder in that site
To publish an Experience Cloud site:	• Be a member of the site AND Create and Set Up Experiences OR • Be a member of the site AND an experience admin or publisher in that site
To create a Lightning Bolt Solution with an Experience Builder template or page:	Customize Application AND Create and Set Up Experiences AND View Setup and Configuration

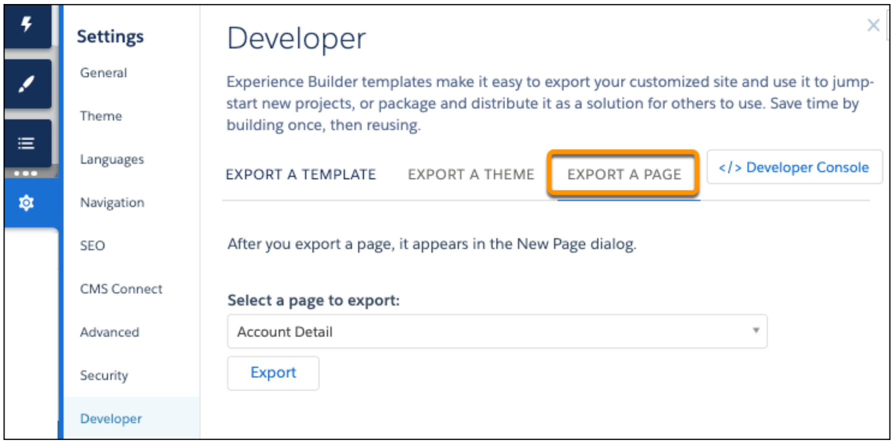
EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

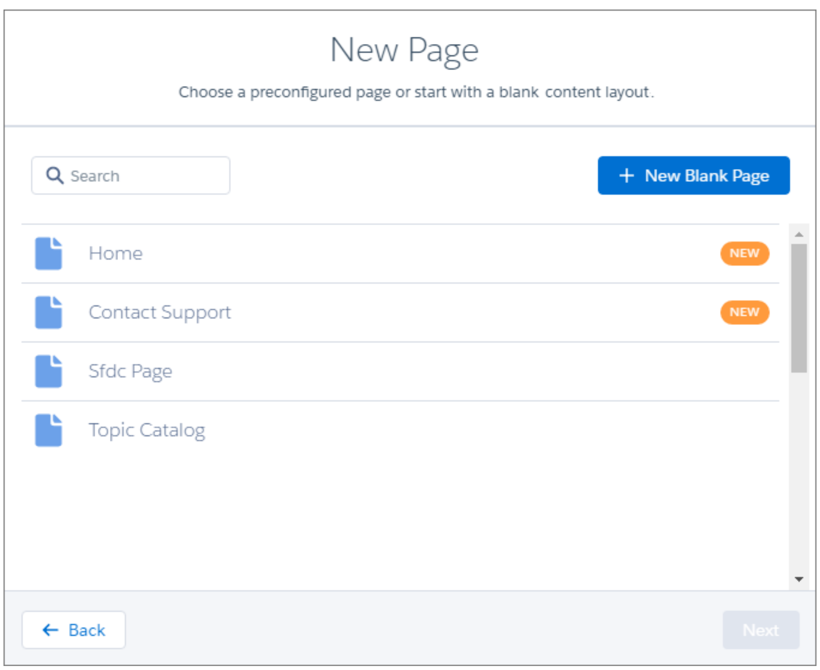
Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Export pages that you've customized in an Experience Builder site. Use them as a base for new pages, or package and distribute them for others to use in their sites.

1. In Experience Builder, select **Settings** > **Developer**, and click **Export a Page**.



2. Select the page to export.
3. Click **Export**.
   After you export a page, it appears in the New Page dialog box in all the Experience Builder sites in your org. If you package the page and install it in another org, it appears in that org's New Page dialog box. A newly installed page is highlighted as New for 30 days.



4. To distribute your page, create a managed package that includes the page. Or add the page to a Lightning Bolt Solution, and include it in the package.

   Note: You can quickly get to the Package page of Salesforce Setup by selecting **Package the Experience Builder page** in the export page success message.

To delete an exported or imported page, from Setup, in the Quick Find box, enter `Digital Experiences`, and click **Pages**.

Existing pages in Experience Builder that are based on the deleted page are unaffected. However, deleted pages no longer appear in the New Page dialog.

SEE ALSO:

Export and Packaging Considerations for Lightning Bolt Solutions
Package and Distribute Your Apps
ISVforce Guide: Creating and Uploading a Managed Package

Add Flows to a Lightning Bolt Solution

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To create a flow category:
- Customize Application

To create a Lightning Bolt Solution without an Experience Builder template:
- Customize Application AND View Setup and Configuration

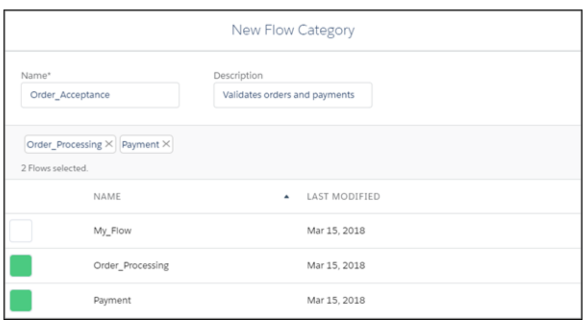
To create a Lightning Bolt Solution with an Experience Builder template:
- Customize Application AND Create and Set Up Experiences AND View Setup and Configuration

When you want to add flows to a Lightning Bolt Solution, group them into a flow category. Then add one or more flow categories to your solution.

You can use a Lightning Bolt Solution to publish a turnkey solution on AppExchange, implement a site with a complete solution or new look, or reuse automated processes that use flows.

You can only add active flows to a flow category.

1. From Setup, enter `Flow Category` in the Quick Find box, and select **Flow Category**.
2. Click **New Flow Category**.
3. Enter your developer name and a description. For the name, only alphanumeric characters and underscores are valid.
4. Choose flows from the list of active flows.



5. Save the flow category.
6. Add the flow category and any custom Lightning apps, Experience Builder templates, or other flow categories that you want to export to a Lightning Bolt Solution.
7. Package the solution to distribute in your orgs or in AppExchange.

SEE ALSO:

Flow Builder

Export and Packaging Considerations for Lightning Bolt Solutions

Before you export and package a Lightning Bolt Solution, keep the following considerations and limitations in mind.

Tip: We recommend using managed packages to avoid naming conflicts with other packages in your customer's org or your own.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

Add Custom Apps

- When you include apps in a Lightning Bolt Solution, follow general guidelines in the ISVforce Guide for developing and distributing Lightning apps.
- When you package the solution, app components are automatically added to the package. For example, the package includes customized fields, page layouts, and relationships with standard objects.

Add Flows

- To reuse a single flow or a group of flows, add them to a flow category. Then include the flow category in your Lightning Bolt Solution.
- You can add only active flows to a flow category.

Export and Package an Experience Builder Template

- An exported template name must be unique.
- You can export a customized template from Experience Builder and include it in a Lightning Bolt Solution, but including a template isn't required.
- When you export a template from Experience Builder, the system removes non-alphanumeric characters from template and page names. For example, My Template #2 becomes My_Template_2.
- In the Experience Creation wizard, the template author (for example, *by Salesforce*) differs for an exported and imported template. When you export a template, your org name is shown within your own org. When you import a template, the publisher name of the package is shown.
- For navigation menu items that link to objects, list views are reset to the default list view. Also, custom list views for standard objects aren't included as dependencies, although custom list views for custom objects are included.
- Only the following Administration settings in Experience Workspaces are included.
  - Change password page
  - Forgot password page
  - Home page
  - Login page
  - **Allow employees to log in directly to an Experience Cloud site** option
- The following items aren't included when you export an Experience Builder template. After you import the template and use it to create an Experience Builder site in the destination org, you must manually reconfigure these items.
  - Most Administration settings (except for the settings already listed).
  - Experience Builder settings, including head markup and the Google Tracking ID.
  - Custom theme layout components that aren't listed in **Settings** > **Theme** > **Configure** aren't included. For theme layout components to be included, you don't have to assign them to a page.

  - Custom styles in the CSS editor.
  - Localized content for multilingual sites.
  - Non-default page variations; only default page variations are included. If a page doesn't have a default variation, the page is excluded. For example, if a page has two variations that are both set to audience-based visibility, then the page is excluded entirely.
- If you upgrade a managed template package, existing sites that are based on the upgraded template aren't updated.
- Some pages in a template are available only when a feature is enabled in your org—for example, the Article Detail page requires Salesforce Knowledge. An exported template includes just the pages that exist in your site at the time of export. Any site that's built using the exported template includes only those same pages. For further assistance, contact Salesforce Customer Support.

Note: Some components show errors when you deploy or export a site as a template and require you to manually configure the component's properties in Builder. For example, to set filters for the Object Home and Record List components in your exported site, navigate to the component properties. Then reconfigure the filter that you want to use from the dropdown menu.

Export and Package a Theme

- You can export a custom Experience Builder theme from Experience Builder but a standalone theme can't be included in a Lightning Bolt Solution.
- An exported theme name must be unique.
- Custom theme layout components that aren't listed in **Settings** > **Theme** > **Configure** aren't included. For theme layout components to be included, you don't have to assign them to a page.
- If you upgrade a managed theme package, existing sites that are based on the upgraded theme aren't updated.
- When you export a theme from Experience Builder, the system removes non-alphanumeric characters from your theme name. For example, My Theme #2 becomes My_Theme_2.

Export and Package a Single Experience Builder Page

- The exported Experience Builder page name must be unique.
- When you export a page, the system generates a developer name (`devName`) by prepending the site name and removing non-alphanumeric characters. For example, My #awesome page in the Acme site becomes Acme_My_awesome_page. Developer names longer than 80 characters are truncated.
- When you export an Experience Builder page, its page variations aren't included in the package. Export the page variations separately.
- Exported page variations use the naming convention `[Site Name]_[Page Name]_[Variation Name]`.

Original Page Name	Exported Page Name	Exported Page Developer Name
Coffee Fans	Coffee Fans	Acme_Coffee_Fans
West Coast (page variation)	Coffee Fans - West Coast	Acme_Coffee_Fans_West_Coast
East Coast (page variation)	Coffee Fans - East Coast	Acme_Coffee_Fans_East_Coast

- For images in the Rich Content Editor, we export the version used in the editor, which isn't necessarily the latest version of the asset file.
- Audience-based visibility criteria aren't included in the export process. Manually reenter this information after importing the page to the site in the destination org.

- You can't export individual login pages.

SEE ALSO:

Salesforce App Considerations
Export a Customized Experience Builder Template in a Lightning Bolt Solution
Export a Customized Experience Builder Page in a Lightning Bolt Solution
Package and Distribute Your Apps
ISVforce Guide: Creating and Uploading a Managed Package

Requirements for Distributing Lightning Bolt Solutions

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

Before Salesforce can recognize a Lightning Bolt Solution that's ready for distribution on AppExchange, your solution must meet certain requirements.

Before you distribute your solution, use these checklists.

Requirements for Lightning Bolt Solutions

For all Lightning Bolt Solutions that are ready for distribution, make sure that you have:

- [ ] Included at least one of the following:
- A custom Lightning app
- A flow category that contains one or more flows
- An Experience Builder template
- [ ] Tested all site functionality and appearance across desktop, tablet, and mobile devices
- [ ] Confirmed that your customizations have no regressions (each release)
- [ ] Verified that Salesforce approves of all third-party technology that you use
- [ ] Ensured proper code coverage, and executed basic performance testing
- [ ] Adhered to all Salesforce Lightning developer guidelines (such as attribute enforcements)
- [ ] Included written installation and configuration documentation
- [ ] Developed appropriate customer support for custom functionality

Requirements When Including an Experience Builder Template

If your solution includes a template, make sure that you have:

- [ ] Developed a custom Experience Builder template
- [ ] Included at least one custom Lightning component (API version 40.0 or later)
- [ ] Included at least one custom Theme Layout component with a unique visual design
- [ ] Tested the template with the Strict CSP enabled in your site settings

Best Practices

- To improve automation and code coverage, use a Salesforce testing framework, such as the Lightning Testing Service (LTS).

- Include only essential Visualforce components and pages.

SEE ALSO:

Experience Cloud Developer Guide: Create Custom Theme Layout Components for Experience Builder

Lightning Aura Components Developer Guide: Salesforce Lightning CLI

ISVforce Guide: Publish Your Offering on the AppExchange

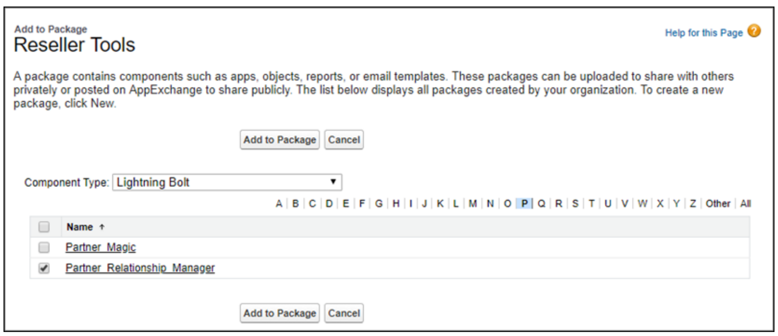
Security Developer Center

Package and Distribute a Lightning Bolt Solution

After you create a Lightning Bolt Solution, package the solution to distribute it to other users or orgs. You can upload the package to AppExchange to share or sell your solution.

A package is a container for something as small as an individual component or as large as a set of related apps. Packages come in two forms—managed and unmanaged. We recommend using only managed packages to avoid naming conflicts with other packages in your customer's org or your own. To create a managed package, use a Developer Edition org.

1. From Setup, enter `Package` in the Quick Find box, and then click **Package Manager**.
2. To package a Lightning Bolt Solution, select **Lightning Bolt Solution** as the component type, and select your solution. To package a standalone Experience Builder template, theme, or page, select **Lightning Community Template**, **Lightning Community Theme**, or **Lightning Page**, respectively, as the component type to add.
   All supported dependencies are included.



3. Upload the package. Then distribute it on AppExchange, or share the link privately with your clients, customers, or partners.

SEE ALSO:

Create a Lightning Bolt Solution

ISVforce Guide: Overview of Packages

ISVforce Guide: Creating and Uploading a Managed Package

ISVforce Guide: Publish Your Offering on the AppExchange

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To create an Experience Cloud site:

- Create and Set Up Experiences AND View Setup and Configuration

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences
- OR
- Be a member of the site AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences
- OR
- Be a member of the site AND an experience admin or publisher in that site

To create and upload packages:

- Create AppExchange Packages AND Upload AppExchange Packages

Experience Management

Experience Management is your one-stop shop for administering, managing, and moderating your Experience Cloud site.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

IN THIS SECTION:

Experience Cloud Site Managers, Moderators, and Admins Working Together

Experience Cloud sites can thrive when their managers, moderators, and admins understand their unique roles and work together effectively.

Measure Success with Dashboards

Use Dashboards to view your Experience Cloud site's analytics, such as metrics and trends on activity. Dashboards give you mid-term to long-term views on adoption and engagement, providing you with a high-level view into the health of your site. Dashboards also help you monitor return on investment (ROI) and key performance indicators (KPI).

Experience Cloud Site Managers, Moderators, and Admins Working Together

Experience Cloud sites can thrive when their managers, moderators, and admins understand their unique roles and work together effectively.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

An Experience Cloud site manager and moderator work hand-in-hand. They are partners and support one another in fostering engagement and harmony. Sometimes, they perform some of the same tasks, but each has unique contributions. While the site manager is typically responsible for monitoring adoption and engagement, the moderator is typically responsible for ensuring the site is a healthy environment and that members feel encouraged to be active and helpful to each other.

Experience Cloud site managers, moderators, and admins all work together to protect, engage, and measure the site's success.

Protect

Prevent spammers, bots, and trolls from attacking the site.

Protect the site from trademark infringement and legal issues.

Ensure site members use appropriate language and adhere to the terms of use.

Engage

Welcome new members, add contributors, and connect members with resources.

Help ensure that members questions are answered quickly.

Acknowledge helpful members and thank them.

Identify, encourage, groom, and retain MVPs.

Measure

Review analytics on community health.

Measure return on investment (ROI) and key performance indicators (KPI), such as money saved and cases deflected.

Identify and track community trends.

IN THIS SECTION:

Manage Your Experience Cloud Site

Set up and monitor your site from Experience Management or Experience Workspaces.

You can customize your site at any time, but if you plan to make major changes, we recommend deactivating the site first.

Important: The options available in Experience Management or Experience Workspaces are based on your site template selection, permissions, and preferences. For example, if your site doesn't use topics, you don't see the Topics section. Some options in the following list might not appear in your site by default. To display all sections, go to **Administration** > **Preferences** and enable **Show all settings in Experience Management** or **Show all settings in Experience Workspaces**.

Home

- View your site's home page dashboard. If your home page still displays a message to install the Salesforce Experience Management package, your administrator hasn't mapped a dashboard yet.
- Preview the site or access your site's settings in the Experience Builder, Lightning Platform, or Site.com Studio from Experience Management or Experience Workspaces.

Engagement

Monitor recent activity and take immediate action directly from Experience Management or from the Moderation workspace in Experience Workspaces.

Your admin sets up Insights. If the Engagement section doesn't appear, the admin hasn't mapped Insights for this site.

Dashboards

View dashboards and monitor information about groups, members, feed activity, moderation, topics, and license usage for this site.

Your admin sets up Dashboards. If the Dashboards section doesn't appear, the admin hasn't mapped dashboards for this site.

Gamification

Use Recognition Badges, Mission Badges, and Reputation to keep your members engaged with your site.

Your admin sets up Gamification.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To access Experience Workspaces or Experience Management:

- Access Experience Management OR Manage Experience OR Create and Set Up Experiences
- AND is a member of the site

To access moderation rules and criteria:

- Manage Experiences OR Create and Set Up Experiences

To customize administration settings or use Experience Builder:

- Create and Set Up Experiences

Moderation

View reports for flagged posts, comments, messages, and files. You can also see a report of all posts that are pending review and set up moderation rules for this site.

Your admin sets up Moderation.

Topics

Create a navigation menu and showcase popular topics in your site.

Typically, your admin sets up navigational topics and featured topics. If you're using self-service templates, navigational topics and featured topics are enabled by default. If the Topics section doesn't appear, your site isn't using topics.

Recommendations

Recommendations can help drive engagement in a site. They can be set up to encourage users to watch videos, take trainings, and more.

Your admin sets up recommendations. If the Recommendations section doesn't appear, the admin hasn't set up recommendations.

Administration

Use the Administration page to update the site's basic setup.

- Members—Add or remove members based on profiles or permission sets.
- Tabs—Select the tabs you want site members to see. Tabs are also used to determine site navigation in the Salesforce mobile app. If your site was created with one of the self-service templates, tab settings aren't used.
- Branding—Select a provided branding color theme. This branding controls header and footer text for pages in your site. The branding settings apply if you're using the default or the Salesforce tabs + Visualforce template.
- Login & Registration—Select the login page for this site, and set up self-registration.
- Emails—Customize email sender information, Chatter email branding, and templates in your site emails.
- Pages—Configure page assignments for your site, and access the Lightning Platform and Site.com settings for this site.
- Preferences—Update important settings, such as content flags, nicknames, public access to Chatter, and file limits.
- Settings—Edit your site name, description, and site URL. You can also manage the status of your site and update your site template.

Lookups in Experience Management and Experience Workspaces initially return the items you most recently viewed from within the site. If an object you're looking for isn't in the Recently Viewed Documents list, try typing all or part of the object name and searching again.

Important: If you're an admin and accidentally remove yourself from a site, you can't access the Administration settings in Experience Management or Experience Workspaces. To add yourself back to the site or make other membership updates, use the API.

SEE ALSO:

What's an Experience Cloud Site Manager?

What's a Moderator?

What's an Experience Cloud Site Manager?

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

Every Experience Cloud site needs someone to take an active role in making sure that the it thrives. Experience Cloud site managers spend time every day encouraging member participation, keeping conversations going, and recognizing members for contributing.

Experience Cloud site managers must be employees of your organization; external site members can't be site managers.

A site manager is a member of the site that takes on the extra responsibility of monitoring site engagement. Experience Cloud site 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 site membership and activity, site managers can figure out how to engage site members and ensure that they participate.

A powerful tool for a site manager is the ability to recognize individual members for their participation, because site managers know that recognition and a little friendly competition usually lead to more active members. Experience Cloud site managers can set up a point system and reputation levels that reward members with points when they perform certain actions. Once members reach the top of the level's point threshold, they move up a level.

IN THIS SECTION:

Assign an Experience Cloud Site Manager

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To assign permission sets:
- Assign Permission Sets

To assign a user as an Experience Cloud site manager, simply give them the "Manage Experiences" permission.

Experience Cloud site managers must be employees of your organization; external site members can't be site managers. To assign a user as a site manager, give them the "Manage Experiences" permission. With this permission, they can access the Experience Management page or Experience Workspaces.

Note: Go to **Digital Experiences** > **Settings** to enable Experience Workspaces.

1. From Setup, enter *Permission Sets* in the `Quick Find` box, then select **Permission Sets**, then click **New**.
2. Create a permission set that includes the "Manage Experiences" permissions.
3. From Setup, enter *Users* in the `Quick Find` box, then select **Users**.
4. Find the user you want to be a site manager and add the permission set to their Permission Set Assignments related list.

The user can now manage the site through Experience Management or Experience Workspaces.

What's a Moderator?

Moderators help ensure the success of your Experience Cloud site by monitoring user activity and flagged items.

In a successful Experience Cloud site, members are actively engaged and communicating with one another. A moderator facilitates knowledge sharing to help members benefit and derive value from their participation. The moderator also helps ensure that all communications and content are appropriate.

Moderators can be users from your internal org or external users with Access Experience Management and moderation permissions. External users who are moderators but don't have management and moderation permissions can moderate within context of the Experience Cloud site, such as directly in the site feed. This person should be accustomed to interfacing with customers and can spend time regularly monitoring the site.

A moderator can:

- Review and act on the list of flagged posts and comments
- Review and act on the list of flagged files
- Remove flags
- Delete inappropriate posts, comments, messages, and files

A moderator can also help drive the success of a site in many other ways.

- Sharing relevant and useful information in posts
- Encouraging members to post and comment on each other's posts
- Setting an example by their activity
- Keeping discussions focused, spam-free, and non-controversial
- Redirecting email conversations to sites when it can benefit other members
- Establishing the site as a reliable source of information and a forum for transparent discussions

You can choose to designate more than one moderator, especially if the site has a large number of members.

Note: Although they share some similar capabilities, a moderator in an Experience Cloud site is different from a Chatter moderator.

IN THIS SECTION:

Which users can moderate?

There are multiple types of users who can moderate an Experience Cloud site when flagging is enabled.

Assign a Moderator

Make one or more people moderators in your Experience Cloud site so they can keep an eye on its content.

SEE ALSO:

Move Feed Items from One Public Group Feed to Another

Which users can moderate?

There are multiple types of users who can moderate an Experience Cloud site when flagging is enabled.

Moderators can be users from your internal org or external users with Access Experience Management and moderation permissions. External users who are moderators but don't have management and moderation permissions can moderate within context of the Experience Cloud iste, such as directly in the site feed. Moderators can continue to flag items even if flagging is disabled for members, although group owners and group managers can only moderate when flagging is enabled.

Who can moderate items in a site depends on permissions or if the user is a group manager or owner. This table shows who can moderate and what actions they can take in the user interface.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

Action	User with Moderate Experiences Feeds	User with Moderate Experiences Files	Group Owner or Manager (on items in groups they own or manage)*
Remove flags on a post or comment	✓		✓
Delete a post or comment	✓		✓
Remove flags on a file		✓	✓
Delete a file		✓	✓

*To allow group owners and managers to moderate, the `Allow members to flag content` option must be enabled.

Assign a Moderator

Make one or more people moderators in your Experience Cloud site so they can keep an eye on its content.

Moderators can be users from your internal org or external users with Access Experience Management and moderation permissions. External users who are moderators but don't have management and moderation permissions can moderate within context of the Experience Cloud site, such as directly in the site feed.

You can assign moderators by assigning a permission set that includes one or more of following moderation permissions.

Permission	Allows Users To
Moderate Experiences Feeds	Review flagged posts and comments and take action, such as removing flags or deleting the post or comment. Moderator options for feed content are available in the site feed and in Experience Management and Experience Workspaces.
Moderate Experiences Files	Review flagged files they have access to and take action, such as removing flags or deleting the file. Moderator options for files are available on a file's detail page and in Experience Management or Experience Workspaces.
Moderate Experiences Chatter Messages	Review flagged messages and take action, such as removing a flag or deleting a message. This permission allows users access to flagged messages only in Experience Cloud sites they're a member of.
Can Approve Feed Post and Comment	Approve, delete, or edit posts and comments that are pending review.
Moderate Experience Users	Freeze external users who are members. Moderators can freeze members on their user profile page or from an Insights report.
Manage Experiences	Moderate content in Experience Management or Experience Workspaces.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To assign permission sets:
- Assign Permission Sets

Permission	Allows Users To
Access Experience Management	Access site pages from Experience Management and Experience Workspaces.

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

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

After you grant moderator permissions to a user, keep these things in mind:

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

Access Experience Management

Experience Cloud site administrators and managers use Experience Management to monitor Experience Cloud site activity, and set up other important management features.

1. Access Experience Management in one of the following ways.
   - From the site:
     - In Salesforce Tabs + Visualforce sites, click in the global header.
     - In Experience Builder-based sites, use the drop-down menu next to your name and click **Experience Management**.
   - From Setup, enter `All Sites` in the Quick Find box, then select **All Sites** and click the **Workspaces** link next to a site. To access this page, you need the Create and Set Up Experiences" permission.
   - From Experience Builder, in the header, use the drop-down menu next to the name of your template and click **Experience Management**.

   If your site has Experience Workspaces enabled, access that instead and navigate to the Moderation workspace.

2. Choose the part of the site you want to manage:

   Note: The options available in Experience Management and Experience Workspaces are based on your site template selection, permissions, and preferences. For example, if your site does not use topics, you don't see the Topics section. Some of To display all sections, go to **Administration** > **Preferences** and enable **Show all settings in Experience Management** or **Show all settings in Experience Workspaces**.

   - Preview the site or access your site's settings in the Experience Builder, Lightning Platform, or Site.com Studio from Experience Management or Experience Workspaces.
   - In Engagement, you can view Insights reports and take action on activity in your site.
   - In Dashboards, you can view site dashboards and reports.
   - In Moderation, you can set up moderation rules and monitor flagged feed items.
   - In Topics, you can manage navigational and featured topics.
   - In Recommendations, you can set up custom recommendations to appear in your site.
   - In Reputation, you can set up reputation levels and points.
   - In Administration, you can customize your site properties, such as name, description, URL, status, and template. You can also update your site settings, such as members, tabs, branding, login and registration, and emails.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To access Experience Workspaces or Experience Management:
- Access Experience Management OR Manage Experience OR Create and Set Up Experiences
- AND is a member of the site

To access moderation rules and criteria:
- Manage Experiences OR Create and Set Up Experiences

To customize administration settings or use Experience Builder:
- Create and Set Up Experiences

Measure Success with Dashboards

Use Dashboards to view your Experience Cloud site's analytics, such as metrics and trends on activity. Dashboards give you mid-term to long-term views on adoption and engagement, providing you with a high-level view into the health of your site. Dashboards also help you monitor return on investment (ROI) and key performance indicators (KPI).

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

IN THIS SECTION:

Enable and Map Dashboards

Community managers can use dashboards in each Experience Cloud site to measure its success. You can even map a dashboard to the Experience Workspaces Home page. You can map custom dashboards or use the ones provided in our AppExchange package.

You can choose to map any dashboard you have access to, but ensure that your community managers have access as well.

All dashboards display as Lightning dashboards, regardless of what types of dashboard you're using or what interface your org is using. For example, a Salesforce Classic dashboard gets displayed as a Lightning dashboard. Not all browsers support this Lightning view, so make sure you're using a supported browser.

Tip: Keep in mind that you can get preconfigured dashboards in the Salesforce Communities Management package available for download on the AppExchange.

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

To map or update your dashboards:

1. Open Experience Workspaces.
2. Click **Dashboards** > **Settings**.
3. For each of the pages, select the dashboard you want to show to community managers. To change the name of the dashboard page, click inside the dashboard label.

   The dashboard you map to Home displays on your Experience Workspaces Home page.
4. Click **Save**.

   Dashboards are visible to community managers when they expand the Dashboards section or visit the Home page in Experience Workspaces.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To map dashboards in Experience Workspaces:

- Create and Set Up Experiences OR Manage Experiences

  AND

  Manage Dashboards in Public Folders

  AND

  Is a member of the Experience Cloud site

Verify the dashboard mappings by clicking **Dashboards** and then clicking each page name. If you mapped a dashboard to the Home page, check that out too.

SEE ALSO:

Create a Dashboard for Your Experience Cloud Site
View Experience Cloud Site Dashboards
Customize Experience Cloud Site Dashboards

Create a Dashboard for Your Experience Cloud Site

While you can show any dashboard in your Experience Cloud site, we recommend creating them based on the custom report types available for sites.

Tip: Keep in mind that you can get preconfigured dashboards in the Salesforce Communities Management package available for download on the AppExchange.

All dashboards show as Lightning dashboards, regardless of the type of dashboard that you use or the interface that your org uses. For example, a Salesforce Classic dashboard is displayed as a Lightning dashboard. Not all browsers support this Lightning view, so make sure to use a supported browser.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To create custom report types:
- Manage Custom Report Types

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

To create and share dashboards:
- Manage Dashboards in Public Folders

Open Experience Workspaces.

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

   Only reports that are based on the Networks object show Experience Cloud site-specific information in Experience Workspaces.

   Note: You can create reports based on other objects and expose them in Experience Workspaces. Keep in mind that they show data from across your org, not just for the site in which you're viewing them.

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

2. Use the custom report type to create a report.

   Be sure not to filter the report by Network ID. Filtering by Network ID ensures that the report dynamically displays data for the Experience Cloud site that you view it from. When you add a Network ID filter, it causes the report to show data only for the site with that Network ID. The report shows this limited data, regardless of which site 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.

For a Salesforce Classic dashboard to optimally render in the Lightning view used in Experience Workspaces, make sure that your dashboard meets these requirements.

- Includes only up to 20 reports arranged within three columns
- Doesn't include unsupported charts, such as funnel, scatter, table, multi-metric, pie, and gauge

  For a list of dashboard features not supported in the Lightning view, see Reports and Dashboards: Lightning Experience Limitations.

Note: Metrics are supported in the Lightning view, but they display as large tiles. We recommended that you don't include metrics in your dashboards.

4. Share the folder that you save your dashboard in with your community managers.
5. From Experience Workspaces, click **Dashboards** > **Settings** to map your dashboard.

When a community manager accesses Experience Workspaces, the dashboard appears under Dashboards. If you mapped a dashboard to the Home page, the dashboard appears there.

Dashboards in Experience Workspaces are automatically refreshed every 24 hours. To see the latest data, click **Refresh**. If you access the dashboard after it has been recently refreshed, the dashboard displays the globally cached data from the last refresh. If the dashboard hasn't been refreshed in 24 hours, it's refreshed automatically when you access it. All role-based external users in your Experience Cloud site can refresh dashboards set up with "Run as specified user" and "Run as logged-in user" up to 1,000 times daily per org. Scheduled and automatic refreshes don't count against the limit. There is no refresh limit for internal users.

Note: Experience Cloud sites don't fully support dashboard subscriptions. If you subscribe to dashboards, you receive email notifications with updated dashboard information, but you can't click through to the dashboard from the email notification.

Remember that you can customize your dashboards at any time. To edit your dashboard, go to the **Dashboards** > **Settings** page in Experience Workspaces. Click into the **Label** field to edit the page name and select the down arrow to the right of the **Dashboard** field to map to a different dashboard. Click **Edit dashboard** to open the dashboard in your internal Salesforce org. If you're using a dashboard that was created in Lightning Experience, the edit link doesn't work.

SEE ALSO:

Create a Custom Report Type

Create a Report

Track Experience Cloud Site Activity with Custom Reports

Share a Report or Dashboard Folder in Salesforce Classic

View Experience Cloud Site Dashboards

Use dashboards to monitor the health of your Experience Cloud site.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To view dashboards:
- Manage Experiences

  OR

  Create and Set Up Experiences

  AND

  Is a member of the Experience Cloud site

All dashboards show as Lightning dashboards, regardless of the type of dashboard that you use or the interface that your org uses. For example, a Salesforce Classic dashboard is displayed as a Lightning dashboard. Not all browsers support this Lightning view, so make sure to use a supported browser.

1. Open Experience Workspaces.

   Experience Workspaces are available only on desktop, not on mobile devices.

2. Click **Dashboards**.

   Note: If the Dashboards section isn't displayed, your administrator hasn't mapped them for your Experience Cloud site.

   Pages that have dashboards mapped to them appear in the Dashboards section or on the Home page.

3. Click the dashboard page that you want to view.
   The dashboard appears. For an immediate refresh of dashboard data, click **Refresh**

   Note: The refresh button isn't available in Experience Builder sites on mobile devices.

   If you access the dashboard after it was recently refreshed, the dashboard shows the globally cached data from the last refresh. If the dashboard hasn't been refreshed in 24 hours, it's refreshed automatically when you access it. All role-based external users in your site can refresh dashboards set up with Run as specified user and Run as logged-in user up to 1,000 times daily per org. Scheduled and automatic refreshes don't count against the limit. There's no refresh limit for internal users.

   Note: Experience Cloud sites don't fully support dashboard subscriptions. If you subscribe to dashboards, you receive email notifications with updated dashboard information, but you can't click through to the dashboard from the email notification.

4. To view a related report, click **View Report** on the dashboard.

   Remember that the dashboards are configured to show site-specific data.

   Be sure not to filter the report by Network ID. Filtering by Network ID ensures that the report dynamically displays data for the Experience Cloud site that you view it from. When you add a Network ID filter, it causes the report to show data only for the site with that Network ID. The report shows this limited data, regardless of which site you view it in.

SEE ALSO:

What's the difference between Engagement Insights and dashboards?

Customize Experience Cloud Site Dashboards

Customize Experience Cloud Site Dashboards

Customize your dashboards to manage and prioritize the metrics that you want to view for your Experience Cloud site.

All dashboards show as Lightning dashboards, regardless of the type of dashboard that you use or the interface that your org uses. For example, a Salesforce Classic dashboard is displayed as a Lightning dashboard. Not all browsers support this Lightning view, so make sure to use a supported browser.

1. Click **Dashboards** > **Settings** in Experience Workspaces.
2. To edit the dashboard name, click the Label field and enter your changes.
3. To map to a different dashboard, click the down arrow right of the Dashboard field, and then click the desired dashboard.
4. To edit the dashboard in your internal Salesforce org, click **Edit Dashboard.**

   Note: If you're using a dashboard that was created in Lightning Experience, the edit link doesn't work.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To view dashboards:
- Manage Experiences

  OR

  Create and Set Up Experiences

  AND

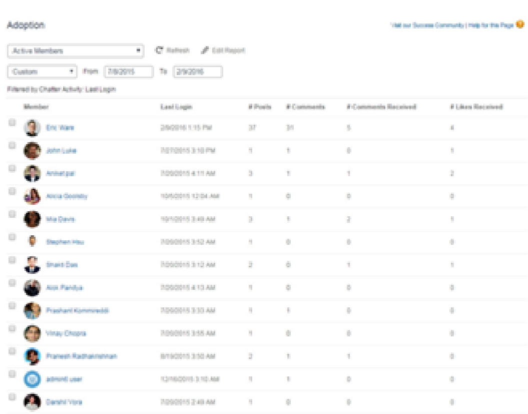
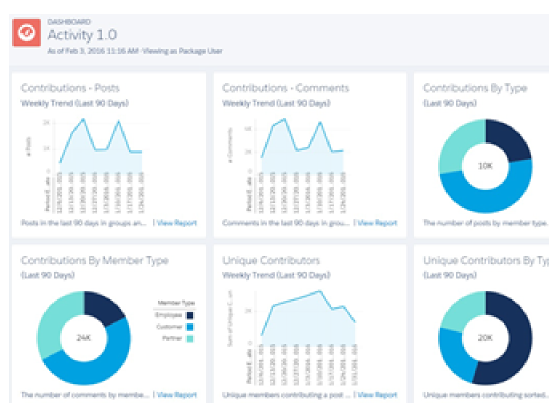
  Is a member of the Experience Cloud site

SEE ALSO:

What's the difference between Engagement Insights and dashboards?

What's the difference between Engagement Insights and dashboards?

Engagement Insights let you take immediate action on recent activity in your Experience Cloud site, and the reports in dashboards let you see trends.

Use Engagement to view, monitor, and act on your Experience Cloud site's activity. Engagement Insights give you a detailed look at a specific area of your site.	Use Dashboards to view your Experience Cloud site's metrics, such as trends on activity. Dashboards give you mid-term to long-term views on adoption and engagement in your site. They help you monitor return on investment (ROI) and key performance indicators (KPI).
	

For example, you can visit the **Engagement** > **Adoption** page to view a report about new members that have received the most likes on their posts and comments. This Engagement Insights report helps you identify and engage with your active new members that are receiving positive feedback from other members.

For example, you can visit the **Dashboards** > **Activity** page to track total posts and comments including overall contribution trends in your Experience Cloud site.

SEE ALSO:

View and Customize Engagement Insights for Your Experince Cloud Site

View Experience Cloud Site Dashboards

Customize Experience Cloud Site Dashboards

Experience Cloud and Marketing Cloud Integration with Journey Builder

With the Marketing Cloud Journey Builder, create personalized journeys for your site based on triggering events or geared for specific audiences. Greet new users with rich content emails, send reminders to users who need profile pics, or schedule follow-up emails for users who log a case. To use this feature, you must have both Experience Cloud and Marketing Cloud licenses.

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

Note: This feature passes member information, including email addresses, from the Experience Cloud to the Marketing Cloud.

Trigger a personalized journey with events, or choose a specific audience.

Examples of events include:

- User joins a site
- Case creation
- User buys a product (depending on configuration)
- New Chatter group membership
- New Chatter post creation
- Chatter question and answer activity
- Create or update any custom object and most standard objects

Examples of audiences include:

- All users of the site
- Users who own a certain product (depending on configuration)
- Users with the highest number of reputation points
- Users who belong to the same Chatter group
- Users who haven't contributed in the last number of days

The two clouds integrate through Marketing Cloud Connect (available on AppExchange). When it's set up, you're ready to go. The process and email creation is all handled in Journey Builder. The See Also links guide you to those steps.

A few things to do and consider before you get started:

- Make sure that you have both Marketing Cloud and at least one site set up.

- Install the Marketing Cloud Connect package.
- Decide whether to use contact or user data.

Note: Adding users to a community is slower when triggering journeys. If you're adding lots of new users, like more than 1,000, at once, we suggest letting Journey Builder run overnight.

IN THIS SECTION:

SEE ALSO:

Connect the Clouds

Journey Builder

Get Started With Journey Builder

Experience Cloud Journey Data Model

When you create an Experience Cloud journey, you choose whether to add user or contact data. To avoid unintentionally sending emails to people who have opted out, you must stay consistent. There are also some event trigger and tracking limitations.

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

Every external site member has both an associated user object and a contact object. Internal site users, including employee site users, typically have only the user object. The email preferences for the user and contact records aren't linked. A person who opts out of a contact record journey still gets email from user record journeys. A best practice is to choose one data type and stick to it.

A couple of other points to consider when picking the data model:

- Some events can trigger only user-based journeys. When you create a journey for a given event, the application shows you whether you can add user, contact, or either record to the journey. For many common community objects, only the user record is available. If you plan to standardize on contacts, use audience-based journeys instead as they can use either the user or contact records.
- Emails sent by journeys that are based on contact records are logged on the contact objects in Salesforce. Logging isn't always the case for journeys based on user records. If tracking is important, go with contacts.

SEE ALSO:

Triggering Journeys Based on Audiences
Triggering Journeys Based on Events

Email Preferences

The Unsubscribe link at the bottom of a Marketing Cloud email opts the person out of all further emails from that instance of Marketing Cloud. If you want users to be able to unsubscribe from site emails without unsubscribing from other brand or company emails, some setup is required.

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

Note: Email preferences aren't automatically synced between Experience Cloud and Marketing Cloud without customization. Consider discussing implementing a custom subscription center with your integrator or Salesforce services.

The controls for system-generated emails from a site, like comment notifications, are managed within the site by users, not within Marketing Cloud.

SEE ALSO:

The Profile Center and Subscription Center in Distributed Sending
Manage Your Community Email Notifications

Triggering Journeys Based on Events

You can trigger journeys based on an event that happens in the site, like when members join.

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

For an event to trigger a journey, the object that the event happens to must be workflow-enabled. Most standard objects in Salesforce (such accounts, leads, case, and opportunity), all custom objects, and many community-specific objects are workflow enabled. Some site-specific objects, however, aren't.

Note: As a best practice, create sample journeys to make sure that the objects you want to use can trigger a journey and the data is accessible.

SEE ALSO:

Experience Cloud Objects for Creating Member Journeys

Determine If an Object Can Trigger Journeys

The Salesforce Data Event

Salesforce Experience Cloud

Triggering Journeys Based on Audiences

You can select a set of users—an audience—and put them into a journey. Your audience can be specific and include, say, a user who purchased a certain product and posted within the last 30 days.

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

To define the audience, you select the users using either SQL in Automation Studio or Audience Builder. Make sure that Marketing Cloud can access the data tables. In core Salesforce, the tables must be replicated and synced to Marketing Cloud as a Synchronized Data Source within Contact Builder. This process assisted by the Marketing Cloud Connect package, but it's not automatic. You must choose which tables you want to sync and the object must be replicable.

Note: After object data is synced into Marketing Cloud, you can use the data to make decisions at junction points in a journey. Such junctions are known as decision splits.

SEE ALSO:

Sync an Object to the Marketing Cloud

Automation Studio

Audience Builder

Configure a Decision Split

Interact with Synchronized Data Sources

Determine If an Object Can Trigger Journeys

Before you create an event-based journey, check that the object you want to use works. This test helps you identify available objects.

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

1. In Marketing Cloud, create a journey.
2. Drag the **Salesforce Data Event** tile onto the canvas.
3. To configure the event, click the icon.
4. Select **Salesforce Data**.
5. In **Select an Object**, look for the object you're interested in. If you don't see an object, it can't be used to trigger a journey.

Sync an Object to the Marketing Cloud

To create an audience-based Journey, sync object data to the Marketing Cloud.

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

1. In Marketing Cloud, go to **Audience Builder** > **Contact Builder**.
2. Click **Data Sources**.
3. Click the Synchronized tab.
4. Select the data source.
5. Click **Set Up Object**.
6. Look in the **Synchronize Entity** dialog box with the list of objects that can sync. If you don't see the object, it can't be synced.
7. Click **Synchronize** for the entity that contains the data you want to bring into Contact Builder.
8. Select the checkboxes next to the fields you want to synchronize and click **Next**.
9. Using the **Record Collection** buttons, choose whether to bring in all records or begin at a certain date.
10. From the **Poll Schedule** dropdown, choose how often you wish to synchronize data.
11. Click **Save & Synchronize**.

Experience Cloud Objects for Creating Member Journeys

Most, but not all, Experience Cloud objects can be used for creating journeys. This list includes the available objects along with a description, their eligibility status, API object, and use cases (as appropriate).

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

A quick note about object status:

- If you want to create an event-based journey, the object must be workflow-enabled.
- To create an audience-based journey, the object must be replicable.

Object	Description	Status	API	Example Use Case
Sites and Membership				
Network	A site and its settings	• Not Workflow-enabled • Not Replicable	Network	
NetworkMember	Individual user memberships	• Workflow-enabled • Replicable	NetworkMember	Triggers when a new member joins the community
NetworkMemberGroup	List of profiles and permission sets added to	• Not Workflow-enabled	NetworkMemberGroup	

	a site (not related to Chatter groups)	• Not Replicable		
Chatter Groups				
CollaborationGroup	A Chatter group	• Workflow-enabled • Not Replicable	CollaborationGroup	
CollaborationGroupMember	Member of a Chatter group	• Workflow-enabled • Replicable	CollaborationGroupMember	Triggers when a user joins a Chatter Group in the Community
CollaborationGroupFeed	A single item on a Chatter group feed	• Not Workflow-enabled • Replicable	CollaborationGroupFeed	
Feeds				
FeedItem	Entry in the feed	• Workflow-enabled • Replicable	FeedItem	Triggers when user asks a question or makes another type of feed post
FeedComment	Comment added to a feed by a user	• Not Workflow-enabled • Replicable	FeedComment	
Topics				
Topic	A topic	• Workflow-enabled • Replicable	Topic	
TopicAssignment	Relationship between a topic and an entity	• Workflow-enabled • Replicable	TopicAssignment	Triggers when a user posts a question on a specific topic, or adds a topic to any FeedItem
EntitySubscription	Subscription for following a record or another user	• Not Workflow-enabled • Replicable	EntitySubscription	Triggers when a user follows a topic, user, or record
Cases				
Case	Service case	• Workflow-enabled • Replicable	Case	Triggers when a user opens or updates a case

Insights for Engagement

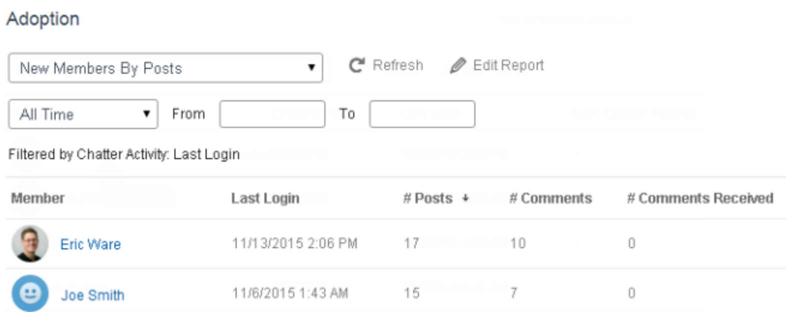
Insights are reports that help community managers monitor activity and take action on that activity. Insights make it easier to manage day-to-day moderation tasks, encourage engagement, and drive member adoption. You can set up Insights to monitor new members, unanswered questions, newly created groups, trending topics, and even recent Chatter contributions.

EDITIONS

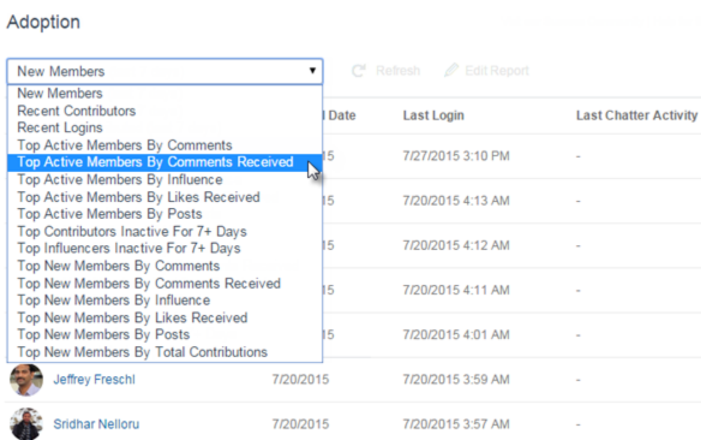
Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

Example: With an Insights report set up to track new members, community managers can quickly navigate to a new member's profile to send them a welcome message.



They can also access other reports about members directly from the Insights page using the drop-down menu.



Tip: Let us do the setup work for you! Get out-of-the-box Engagement Insights in the Salesforce Communities Management package available for download from the AppExchange. To use the preconfigured Engagement Insights, your Experience Cloud site must use Chatter.

Insight reports provided in the package are 100% customizable. You can change the default page names, report folder mappings, and even the report columns and filters at any time. So don't be afraid to customize or change what you get in the package. You won't hurt our feelings.

IN THIS SECTION:

Enable and Map Engagement Insights

Community managers can use Engagement Insights reports to monitor recent activity and take action on that activity. To get up and running quickly, use preconfigured Engagement Insights from an AppExchange package. You can also create and map your own. Each Experience Cloud site can have their own Engagement Insights.

Engagement Insights pages map to report folders in your internal org. All the reports included in that folder are displayed in the dropdown menu on the Engagement Insights page. Adding or removing an Engagement Insights report from the report folder in your internal org updates the Engagement Insights page in Experience Workspaces. On the Engagement Insights page, links are automatically created for report fields such as `Created By` or `Group Name`. For posts, comments, and messages, you can even see the contents directly on the page.

> **Tip:** Get out-of-the-box Engagement Insights in the Salesforce Communities Management package available for download from the AppExchange. To use the preconfigured Engagement Insights, your Experience Cloud site must use Chatter.
>
> When you install the package, report folders are automatically installed in your internal org. If you have no previous Engagement Insights mapped, the package automatically maps them for you. You can change the default mappings at any time.

To map or update Engagement Insights:

1. Open Experience Workspaces.
2. Click **Dashboards** > **Engagement** > **Settings**.
3. Provide a name for each Engagement Insights page and then select the report folder you want to map to the page.

   You can map up to 10 Engagement Insights pages.

   Make sure that you have shared the mapped report folder with your community managers or they can't view the Engagement Insights reports.

4. Click **Save**.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To map Engagement Insights in Experience Workspaces:

- Manage Experiences OR Create and Set Up Experiences

  AND

  Manage Reports in Public Folders

  AND

  Is a member of the Experience Cloud site

Engagement Insights pages are visible to community managers when they expand the Engagement section in Experience Workspaces.

Go check out your changes. Click Engagement and then click each Engagement Insights page name. Use the dropdown menu to verify the reports mapped to each page.

SEE ALSO:

Share a Report or Dashboard Folder in Salesforce Classic

Create Your Own Insights for Your Experience Cloud Site

Create your own Insights to display in Experience Workspaces. We recommend that you create your reports based on custom report types available for Experience Cloud sites.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To create custom report types:

- Manage Custom Report Types

To create, edit, and delete reports:

- Create and Customize Reports

To create and share report folders:

- Manage Reports in Public Folders

Tip: Get out-of-the-box Engagement Insights in the Salesforce Communities Management package available for download from the AppExchange. To use the preconfigured Engagement Insights, your Experience Cloud site must use Chatter.

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

   Only reports that are based on the Networks object show Experience Cloud site-specific information in Experience Workspaces.

   Note: You can create reports based on other objects and expose them in Experience Workspaces. Keep in mind that they show data from across your org, not just for the site in which you're viewing them.

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

2. Use the custom report type to create an Insights report.

   Insights reports are just like any other report, except they must also meet the following requirements:

   - The report must be a tabular report.

- The report can't include pagination.
- We recommend that your report returns 2,000 rows or fewer because only the first 2,000 rows are displayed in Experience Workspaces.
- To view "Approve" and "Delete" comment actions, you must add the FeedCommentID column to your Insights report.

Be sure not to filter the report by Network ID. Filtering by Network ID ensures that the report dynamically displays data for the Experience Cloud site that you view it from. When you add a Network ID filter, it causes the report to show data only for the site with that Network ID. The report shows this limited data, regardless of which site you view it in.

3. Save the report to a new report folder that you can map to in Experience Workspaces.

   We recommend that you create a separate report folder for each of your Insights pages. For example, create one report folder called `Insights Members` and another called `Insights Moderation`.

   Engagement Insights pages map to report folders in your internal org. All the reports included in that folder are displayed in the dropdown menu on the Engagement Insights page. Adding or removing an Engagement Insights report from the report folder in your internal org updates the Engagement Insights page in Experience Workspaces.

4. Share your Insights report folder with your community managers.
5. In Experience Workspaces, click **Dashboards** > **Engagement** > **Settings** to map Insights pages to your report folder.

When a community manager accesses Experience Workspaces, the Insights reports appear in the dropdown menu on the mapped Engagement page.

Note: Some Insights are not available in Developer Edition or sandbox orgs.

SEE ALSO:

Create a Custom Report Type

Create a Report

Track Experience Cloud Site Activity with Custom Reports

Share a Report or Dashboard Folder in Salesforce Classic

Create Custom Actions for Insights

Create Custom Actions for Insights

Do more with Insights reports with custom actions. Say a spammer attacks your Experience Cloud site. You can create and use a custom action to remove all the spammer's posts and comments with just one click. Custom Insights actions work with standard objects and custom objects.

When you click an Insights action in the report, behind the scenes a Visualforce page drives the action. The Visualforce page links to standard or custom objects using standard controllers or standard list controllers.

Here are the high-level steps of how to create a custom Insights action.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To create, edit, and set version settings for Visualforce pages:
- Customize Application

To edit custom Visualforce controllers:
- Author Apex

1. Create a Visualforce page.

   There are a few options you can use:

   - Use a standard controller

     Choose this option to create a Visualforce page that contains the same functionality and logic used in standard Salesforce pages. For example, if you use the standard Accounts controller, clicking a **Save** button in a Visualforce page results in the same behavior as clicking **Save** on a standard Account edit page.

   - Use a standard list controller

     Choose this option to create a Visualforce page that can display or act on a set of records. Examples of existing Salesforce pages that work with a set of records include: list pages, related lists, and mass action pages.

   - Use a controller extension that uses Apex

     Choose this option if you want to expose new functionality, customize the navigation through an application, use callouts or web services, or if you need finer control for how information is accessed for your page.

   All options work with standard objects and custom objects.

   For detailed information about these options, see the Visualforce Developer Guide.

2. Add your custom action to the Insights report.

   Actions are displayed based on the data returned in the report. Make sure that you have a report that is currently returning the data your action needs.

   a. Open Experience Workspaces.
   b. Navigate to the Insights report that you want to apply your new custom action to.
   c. On the report, click and then add your custom action from the picklist.

3. Ensure that your users have the correct permissions to complete your custom action.

Depending on how you set up your custom action, after the action is executed, the user either stays on the Insights page or is redirected to a page in your internal org. Unlike our standard Insights actions, users don't receive the standard success or failure message for custom actions.

Example: Here's an example of a custom action to delete all activity from an Experience Cloud site member. This custom action is great for cleaning up thesite after a spam attack.

Create a custom controller extension using an Apex class and use it in your Visualforce page. The following `DeleteAllActivityControllerExtension` class is an example of a custom controller extension.

```
public with sharing class DeleteAllActivityControllerExtension {

    private List<Id> ids;
    private String retURL;
    private Database.DeleteResult[] deleteResult = null;
    private Map<String, String> resultMap;
    private String success = 'success';
    private String failure = 'failure';

   public DeleteAllActivityControllerExtension(ApexPages.StandardController controller)
 {
        resultMap = new Map<String, String>();
        /* The IDs you select on the Insights page are stored in a comma separated
string of IDs.
        This string is passed in a parameter called "idsList" */
        String idsList = ApexPages.currentPage().getParameters().get('idsList');
       //The return URL to the Insights page is passed in a parameter called "retURL"

        retURL = ApexPages.currentPage().getParameters().get('retURL');
        ids = idsList.split(',');
    }

    public PageReference deleteAllActivity() {
        deleteFeedPosts();
        deleteFeedComments();
        //Include these two lines of code to be redirected to the Insights page after
 you click the action.
        PageReference retPage = new PageReference(retURL);
        retPage.setRedirect(true);
        Integer failureCount = calculateFailureCount();
        Integer successCount = ids.size() - failureCount;
        retPage.getParameters().put(success, String.valueOf(successCount));
        retPage.getParameters().put(failure, String.valueOf(failureCount));
        return retPage;
   }

   private void deleteFeedPosts() {
        List<FeedItem> feedItems = [Select Id, CreatedById FROM FeedItem WHERE
CreatedById IN :ids];
        deleteResult = Database.delete(feedItems, false);
        //Update the resultMap with failures to calculate the failureCount
        if(deleteResult != null) {
            for(Integer i=0;i < deleteResult.size();i++) {
                if (!deleteResult.get(i).isSuccess()) {
                    for(Database.Error error : deleteResult.get(i).getErrors()) {
                        resultMap.put(string.valueOf(feedItems.get(i).CreatedById),
failure);
                    }
                }
```

```
            }
        }
    }

    private void deleteFeedComments() {
        List<FeedComment> feedComments = [Select Id, CreatedById FROM FeedComment WHERE
CreatedById IN :ids];
         deleteResult = Database.delete(feedComments, false);
         //Update the resultMap with failures to calculate the failureCount
         if(deleteResult != null) {
             for(Integer i=0;i < deleteResult.size();i++) {
                 if (!deleteResult.get(i).isSuccess()) {
                     for(Database.Error error : deleteResult.get(i).getErrors()) {
                        resultMap.put(string.valueOf(feedComments.get(i).CreatedById),
failure);
                     }
                 }
             }
         }
    }

    private Integer calculateFailureCount() {
        Integer failureCount = 0;
        for (String result : resultMap.values()) {
             if (failure == result) {
                 failureCount++;
             }
         }
         return failureCount;
    }

}
```

This code creates a **Delete All Activity** button in your Insights report. This button deletes all posts and comments for any selected members. If you wanted to delete all private messages and files too, you could expand the code.

Note:

- This code example doesn't include any permission checks. This custom action only works for admins.
- The IDs for the items you selected on the Insights report are passed to the Visualforce page using the `idsList` parameter.

The following Visualforce markup shows how the custom controller extension can be used in a page.

```
<apex:page standardController="User"
extensions="DeleteAllActivityControllerExtension" action="{!deleteAllActivity}"
/>
```

SEE ALSO:

Salesforce Help: Visualforce Pages as Global Custom Actions

Visualforce Developer Guide: Standard Controllers

Visualforce Developer Guide: Standard List Controllers

Visualforce Developer Guide: Building a Controller Extension

View and Customize Engagement Insights for Your Experince Cloud Site

Use Engagement Insights to monitor recent activity and immediately take action. Engagement Insights help you manage day-to-day moderation tasks and keep up on adoption and engagement in your Experience Cloud site.

Each Engagement Insights page includes multiple reports. You can access these reports using the dropdown menu on the page. On the Engagement Insights page, links are automatically created for report fields such as `Created By` or `Group Name`. For posts, comments, and messages, you can even see the contents directly on the page.

Engagement Insights are powerful tools that you can use to perform mass-actions. For example, if a spammer attacks your site, you can select all the offending posts and click **Delete Post**.

Important: Some Engagement Insights actions require special permissions. If you can't perform an action, let your admin know.

1. Open Experience Workspaces.
2. Click **Dashboards** or **Moderation**.

   Note: Your admin maps Engagement Insights pages. If the Dashboards or Moderation section doesn't include any Engagement Insights pages, your admin hasn't mapped them yet.

   Pages with mapped report folders appear when you expand the sections.
3. Click the Engagement Insights page you want to view.
   - To access other Engagement Insights reports, use the dropdown menu.
   - Take action! Only the first two actions are displayed on the page. To see more actions, click next to the displayed actions. You can select up to 100 rows at a time.
   - To filter the report by relative and custom date ranges, use the dropdown date filter. Select one of the following relative date ranges: All Time, This Week, This Month, Last Month, Today, Yesterday, Last 7 Days, and Last 30 Days. You can also enter your own custom date range.
   - To sort the report by a specific column, click the column heading. An arrow on the column indicates whether the report is sorted by ascending or descending order.
   - To edit or customize the report, click to open the report in your internal org. From there you can customize the report to fit your needs, such as adding or removing columns and updating the report filters.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To view Engagement Insights in Experience Workspaces:
- Access Experience Management OR Manage Experiences OR Create and Set Up Experiences

  AND

  Is a member of the Experience Cloud site

To customize Engagement Insights reports:
- Create and Customize Reports

Be sure not to filter the report by Network ID. Filtering by Network ID ensures that the report dynamically displays data for the Experience Cloud site that you view it from. When you add a Network ID filter, it causes the report to show data only for the site with that Network ID. The report shows this limited data, regardless of which site you view it in.

- To edit the actions assigned to a page, click ⚙ to open the Edit Engagement Insights Actions page.

  Actions that appear on the Engagement Insights report are displayed based on the data returned in the report. For example, if the report returns data about a user, the **Freeze Member** and **Unfreeze Member** actions are displayed. If the report stops returning data, actions aren't removed. However, when you go to update the actions, we let you know that some are no longer appropriate.

  Each Engagement Insights report can have its own actions. You can edit these actions at any time, but keep in mind that an Engagement Insights report must have at least one action. Actions displayed in the picklist on the Edit Engagement Insights Actions page are all the available and appropriate actions for your report, including custom actions.

Engagement Insights reports are automatically refreshed when you access them. You can also force an update.

SEE ALSO:

Create Custom Actions for Insights

What's the difference between Engagement Insights and dashboards?

Experience Cloud Site Moderation Strategies and Tools

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

Moderation allows you to empower members of your Experience Cloud site to monitor content and ensure that it's appropriate and relevant. Set up rules to automate moderation and do the heavy lifting for you.

Moderation is crucial for an Experience Cloud site to thrive. You need active moderators who are willing to spend time ensuring that the members and content in your site are appropriate and helpful. It's also critical to empower members to speak up when they view something as inappropriate or offensive.

With moderation, you can:

- Designate specific users as moderators so that they can closely monitor the site
- Allow members to flag posts, comments, files, and messages that are inappropriate or spam
- Allow moderators to review and act on flagged items, such as deleting a post, comment, or file
- Allow group owners and managers to moderate within their groups
- Create rules and criteria to automatically block, flag, replace keywords in member-generated content, such as posts or comments
- Create rules to review and approve content from specific members
- Track flagging and moderation activity within your site

To limit the size and types of files allowed in your site, in Experience Workspaces, go to **Administration** > **Preferences**.

To report on moderation activity in your sites, you can use the preconfigured reports from AppExchange. For more information about the AppExchange package, see Report on Experience Cloud Sites with AppExchange Packages. You can also query flagged content or activity using the API, or create a custom report type using `Networks` as the primary object.

If you want to create custom advanced moderation logic for your Experience Cloud site, you can create triggers that flag content. Custom triggers run behind the scenes and don't require you to allow your members to flag content.

If your org is using Transaction Security, moderation offers some of the same functionality. Transaction Security and moderation can be used at the same time.

IN THIS SECTION:

Track Experience Cloud Site Activity with the Moderation Overview Page

Moderation Insights are arranged in clickable tiles on the Moderation Overview page in Experience Workspaces. View the entire picture of your site's moderation activity at a glance and take action on day-to-day moderation tasks.

Enable Members to Flag Items in Your Experience Cloud Site

Turn on flagging for your Experience Cloud site to empower members to flag posts, comments, files, and messages that they deem inappropriate.

Experience Cloud Site Moderation Criteria

Create criteria that define keywords or groups of members. Criteria are used in rules to moderate member-generated content, such as posts and comments.

Experience Cloud Site Moderation Rules

Create and modify rules for your Experience Cloud site to moderate member-generated content. Each rule specifies the member-generated content the rule applies to, the criteria to enforce the rule on, and the moderation action to take. Moderation rules help protect your site from spammers, bots, and offensive or inappropriate content.

Review and Approve Posts and Comments in Your Experience Cloud Site

Moderation rules to review and approve content ensure that non-compliant and inappropriate content isn't immediately visible to everyone in your Experience Cloud site. Posts and comments pending review aren't displayed in the feed; only the author and moderators can see pending posts and comments in the feed. An author can see a pending comment on a pending post only if the author posted both. After you set up the rules, moderators can approve content directly in the feed and in Experience Workspaces.

Moderate Flagged Posts and Comments in Your Experience Cloud Site

Moderators can review a list of posts and comments that members have flagged as inappropriate and act on them. Group owners or group managers, can view flags and act on items in their groups.

Moderate Flagged Discussions in Your Experience Cloud Site

Moderators can delete and unflag posts and comments from discussions, and freeze or communicate with the author of those posts, all from one place.

Moderate Flagged Files in Your Experience Cloud Site

Moderators can review and respond to a list of files that members have flagged as inappropriate or spam. Group owners or group managers can view flags and respond to files in their groups.

Moderate Flagged Direct Messages in Your Experience Cloud Site

Members can flag messages in Experience Cloud sites built using the Customer Service (Napili) template. Moderators can review and act on a list of direct messages that members have flagged as inappropriate or spam.

Moderate Flagged Private Messages in Your Experience Cloud Site

Moderators can review and act on a list of Chatter messages that members flagged as inappropriate or as spam.

Set Up Apex Triggers for Flagging Items

Use triggers to create custom advanced moderation logic that automatically flags items in your Experience Cloud site.

Experience Pulse

Experience Pulse displays metrics at the top of Workspaces. Click a metric to open the corresponding report or dashboard for more information or to take action. Customize the displayed metrics or create ones to meet your needs.

Experience Cloud Site Moderation Limits and Limitations

Moderation limits ensure that your Experience Cloud site performs optimally.

SEE ALSO:

Assign a Moderator

Assign an Experience Cloud Site Manager

Limit Files in Your Experience Cloud Site

Track Experience Cloud Site Activity with the Moderation Overview Page

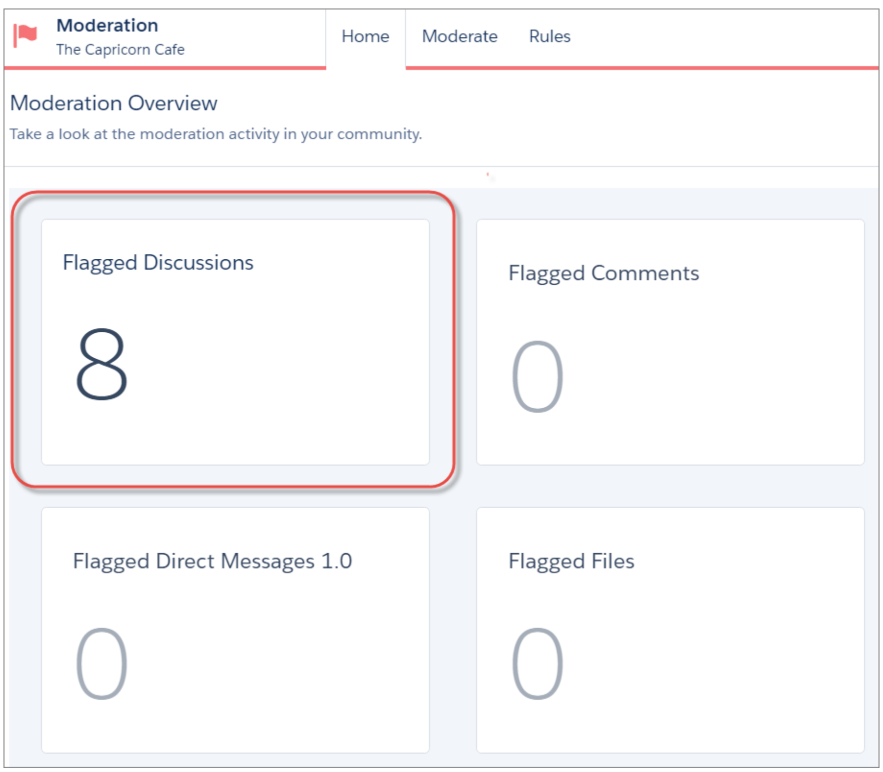
Moderation Insights are arranged in clickable tiles on the Moderation Overview page in Experience Workspaces. View the entire picture of your site's moderation activity at a glance and take action on day-to-day moderation tasks.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

Example: To view all flagged posts and comments, click **Flagged Discussions** and go directly to the Flagged Discussions queue. You can approve or delete flagged posts and comments in bulk, directly from the queue.



Tip: Let us do the setup work for you! Install the Salesforce Communities Management (for Communities with Chatter) package from the AppExchange.

Insight reports provided in the package are 100% customizable. You can change the default Insights page names, report folder mappings, and even the Insights report columns and filters at any time. So don't be afraid to customize or change what you get in the package. You won't hurt our feelings.

Enable Members to Flag Items in Your Experience Cloud Site

Turn on flagging for your Experience Cloud site to empower members to flag posts, comments, files, and messages that they deem inappropriate.

Moderation must be enabled for your org 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 moderator can review it and take action. Remember that moderators can continue to flag items even if flagging is disabled for members.

1. Open Experience Workspaces.
2. Click **Administration** > **Preferences**, then select `Allow members to flag content`.
3. Click **Save**.

With this setting enabled:

- Members can flag posts, comments, and files using the `Flag as inappropriate` option.
- Members can flag messages from within the Experience Cloud site on their My Messages page in Chatter. If a member has turned on email notification for messages, they can also flag the message directly from their email. Members can only flag messages that are sent from sites they are members of.

  Note: Messages can't be flagged in partner or customer portals, your internal org, or from the Salesforce mobile app.

- Group owners and managers can moderate groups they own or manage.

If you want to create custom advanced moderation logic for your Experience Cloud site, you can create triggers that flag content. Custom triggers run behind the scenes and don't require you to allow your members to flag content.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To allow members to flag items:

- Create and Set Up Experiences

  AND

  Is a member of the Experience Cloud site

SEE ALSO:

Assign a Moderator

Experience Cloud Site Moderation Criteria

Create criteria that define keywords or groups of members. Criteria are used in rules to moderate member-generated content, such as posts and comments.

Plan Your Use Cases

Before creating your member criteria, think about what you want to do.

- Do you want to protect your site from bots and spammers? Most spammers attack shortly after they've joined. Set up member criteria based on a user's creation date.
- Do you want to review members' first posts? Set up member criteria that targets users without contributions.
- Do you want to moderate your internal users' activity? Set up member criteria to include only your internal users.
- Do you want to be notified when a partner contributes for the first time? Set up member criteria to include only your partner users that don't have contributions.

Before creating content criteria, think about what you want to moderate.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

- Do you want to moderate profanities and slang? Set up separate keyword lists for each group of related words.
- Do you want to replace competitor product names with asterisks? Create a keyword list just for your competitor products.
- Do you want to monitor content for HIPAA compliance? Create a keyword list that alerts of possible HIPAA violations.

IN THIS SECTION:

Create Content Criteria to Moderate Your Experience Cloud Site

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To view, create, edit, and delete criteria:

- Manage Experiences OR Create and Set Up Experiences

  AND

  Is a member of the Experience Cloud site

Create and modify content criteria that define offensive language or inappropriate content that you don't want in your Experience Cloud site. Content criteria are used in rules to moderate member-generated content, such as posts and comments.

You can also use the Metadata API or Tooling API to set up keyword lists.

Some things to keep in mind:

- Your org can have up to 30 keyword list criteria. This limit is per org, not per Experience Cloud site.
- A keyword list can have up to 2,000 keywords.
- Capitalization and trailing punctuation are ignored when matching your keywords to user-generated content. For example, if your criteria includes `BadWord`, it's matched when a user types `BADWORD` or `badword.`

Set up content criteria to use in your moderation rules.

1. Open Experience Workspaces.
2. Click **Moderation** > **Content Criteria** > **New**.
3. Enter a name, unique name, and description for your criteria.
4. Click **Save**.
5. Update the keywords in your criteria.

   To add keywords, click **Add**.

   - Keywords can only be up to 100 characters and can include letters, numbers, spaces, and special characters.
   - Wildcard characters aren't supported.
   - Separate keywords with commas or line breaks.
   - When adding keywords, you can copy and paste up to 32,000 characters at a time.

   Tip: To cover different variations of the same word, you can use special characters and spaces. For example:

   `bad-word`

`b@dword`

`b a d w o r d`

To delete keywords, select the keywords you want to remove, then click **Delete**.

A message indicates how many keywords were added or failed to add, and the number of duplicates that were ignored. If your entire entry failed to save, review the keyword requirements and then submit again. Don't worry about adding duplicates because they're ignored.

To delete criteria, click **Del** from the Content Criteria page. If criteria is being used by a rule, you can't delete it.

Create Member Criteria to Moderate Your Experience Cloud Site

Create and modify member criteria to use in moderation rules. Target specific groups of members based on their user profile, user type, user creation date, or whether they've posted or previously commented in the Experience Cloud site. Use member criteria in your rules to help pin-point specific use cases, like reviewing posts only from your customer users who were created in the last seven days.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To view, create, edit, and delete criteria:

- Manage Experiences OR Create and Set Up Experiences

  AND

  Is a member of the Experience Cloud site

Some things to keep in mind:

- Your org can have up to 100 member criteria. This limit is per org, not per Experience Cloud site.
- Each member criteria can include up to 100 user conditions.

You can create criteria that includes only user types and user profiles, or just filters. Or if you want it all, your criteria can include user types, user profiles, and filters. Let's get started.

1. Open Experience Workspaces.
2. Click **Moderation** > **Member Criteria**, then click **New**.
3. Enter a name, unique name, and description for your criteria.
4. Select the types of user types or user profiles to include in your criteria.

   You can select any combination of types and profiles. Members are included when they belong to *any* one of your selections.

   If you delete a profile in your internal org, the profile is also removed from your member criteria.
5. Select to filter your members by:
   - `None`—Select this option if you don't want to filter the criteria using the other options. None is the default selection.
   - `User creation date`—Select this option to include only users that were created within a specific time frame. Enter the number of days since the user was created.

     Note: A user's creation date might not be the same date they became a member of the Experience Cloud site. For example, you can have an internal user that was created 120 days ago who became a member of the site five days ago. For users that self-register, their creation date is the date they become a member of the site.
   - `Members without site contributions`—Select this option to include only members that haven't posted or commented in the Experience Cloud site. Posts that are pending review don't count as contributions until they are approved.

   If you selected user types or user profiles, and you also select filter conditions, members are included only if they belong to one of the selected user types or profiles *and* the filter condition.
6. Click **Save** to apply your changes.

Example: Let's look at the following conditions:

`User Types`: Partner

`User Profiles`: Customer Community Plus Login User, Customer Community Plus User, and Customer Community User

`Filter By`: User creation date is set to seven days since the user was created

This member criteria applies to:

- Partner users created in the last seven days
- Customer Community Plus Login User created in the last seven days
- Customer Community Plus User created in the last seven days
- Customer Community User created in the last seven days

You can use this member criteria in a rule to:

- Review and approve their posts
- Be notified of their contributions
- Flag all their contributions

To delete criteria, click **Del** from the Member Criteria page. If criteria is being used by a rule, you can't delete it.

Experience Cloud Site Moderation Rules

Create and modify rules for your Experience Cloud site to moderate member-generated content. Each rule specifies the member-generated content the rule applies to, the criteria to enforce the rule on, and the moderation action to take. Moderation rules help protect your site from spammers, bots, and offensive or inappropriate content.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

IN THIS SECTION:

Customize Preconfigured Moderation Rules

If your Experience Cloud site was created after Spring '17, your site comes populated with preconfigured moderation rules that block, flag, freeze, replace or review banned keywords. Simply activate the rules and they are ready to go. You can customize both the rules and the list of banned keywords.

Create Content Rules to Moderate Your Experience Cloud Site

Create and modify rules to moderate member-generated content in your Experience Cloud site. Content rules protect your site from offensive language and inappropriate content created by spammers or malicious members. You can create content rules that block, replace, flag, or allow you to review and approve member-generated content.

Create Rate Limit Rules to Moderate Your Experience Cloud Site

Create and modify rate rules to monitor and limit how frequently member-generated content is created. Rate rules protect your Experience Cloud site against spammers and bots that attack your site by posting the same message multiple times in a row. You can create rate rules to notify your moderators of suspicious spammer-like behavior or freeze a member on the spot.

How and when do Experience Cloud site moderation rules execute?

Rules that block content run first, followed by rules to review and approve content, then rules that replace content, and last by rules that flag content.

Enable Record Feed Moderation

Run moderation rules on comments or posts on any record feed that is visible from within an Experience Cloud site. Record feed moderation ensures that member posts or comments stay within the guidelines of the site.

Customize Preconfigured Moderation Rules

If your Experience Cloud site was created after Spring '17, your site comes populated with preconfigured moderation rules that block, flag, freeze, replace or review banned keywords. Simply activate the rules and they are ready to go. You can customize both the rules and the list of banned keywords.

- Your org can have up to 30 rules. This limit is per org, not per Experience Cloud site. This limit includes both content rules and rate rules.
- Each content rule can have up to three keyword criteria and ten member criteria.
- Rules that block content run first, followed by rules to review and approve content, then rules that replace content, and last the rules that flag content. If two or more rules perform the same action, the oldest rule runs first, based on the date the rule was created. Rules to replace content don't run when the content also applies to a review rule—we want moderators to review the original content.
- Moderation rules apply only to feed posts, comments, and polls. Moderation rules do not apply to topics that are created.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To view, create, edit, and delete rules:

- Manage Experiences OR Create and Set Up Experiences

  AND

  Is a member of the Experience Cloud site

1. Open Experience Workspaces.
2. Click **Moderation** > **Rules**, then click **Edit** next to the rule that you want to modify.
3. If the rule meets your requirements, simply click **Activate**. Or you can customize the following fields:
   - **Name**—Change the name of your rule.
   - **Unique Name**—Enter a unique name for your rule. The unique name used by the API.
   - **Description**—Optionally, change the description.
   - **Activate Rule**—Select to activate rule.
   - **Applies To**—Specify which types of member-generated content this rule applies to. Posts and comments only apply to content created in groups and user profiles. All feed types, such as polls and links, are supported.
   - **Moderation Action**—Change what you want to happen when the criteria is matched.
     - **Block** prevents the content from being published.
     - **Review** allows users with the Can Approve Feed Post and Comment permission to approve the content before it's published.
     - **Replace** publishes the content with the keywords replaced as asterisks. For example, `BadWord` becomes `*******`.
     - **Flag** publishes the content and then automatically flags the content as inappropriate.
   - **Message for Member**—Change the existing pop-up message that your member sees when their content is blocked. If you don't specify a message, the member sees the standard message: "You can't use `%BLOCKED_KEYWORD%` or other inappropriate words in this site. Review your content and try again." The `%BLOCKED_KEYWORD%` variable displays up to five blocked words. You can also use this variable in your own custom message.

     Tip: For international sites, you can translate this message. From Setup, enter `Translate` in the Quick Find box, then select **Translate**. To provide a translation for the message, select the Moderation Rule setup component and expand the site the rule belongs to.

   - **Member Criteria**—Specify member criteria to enforce this rule. Ask yourself, who should this rule apply to?
   - **Content Criteria**—Specify the content criteria to enforce this rule. Ask yourself, what specific keywords should this rule apply to? A list of banned keywords has been created for you and is preselected for the rule. You can add or remove terms from the list by clicking **Content Criteria** and clicking **Banned Keywords**.

4. Click **Save**.

A few things to bear in mind:

- If you activate a content rule without specifying member criteria, the rule applies to all members.
- If you activate a content rule without specifying content criteria, the rule either:
  - Prevents members from creating posts and comments entirely
  - Sends all posts for review
  - Flags all posts and comments
- If you select member criteria and content criteria, the rule applies only when both criteria are met.
- Specifying criteria is optional. However, we recommend that you include criteria in your rules to target specific members and content.

Create Content Rules to Moderate Your Experience Cloud Site

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To view, create, edit, and delete rules:
- Manage Experiences OR Create and Set Up Experiences

  AND

  Is a member of the Experience Cloud site

Create and modify rules to moderate member-generated content in your Experience Cloud site. Content rules protect your site from offensive language and inappropriate content created by spammers or malicious members. You can create content rules that block, replace, flag, or allow you to review and approve member-generated content.

If your Experience Cloud site uses the Customer Service template, moderation rules apply to questions and group posts created by your members. If your Experience Cloud site uses Salesforce Tabs + Visualforce, moderation rules can also run on publisher actions.

You can also use the Metadata API or Tooling API to set up content rules.

Some things to keep in mind:

- Your org can have up to 30 rules. This limit is per org, not per Experience Cloud site. This limit includes both content rules and rate rules.
- Each content rule can have up to 3 keyword criteria and 10 member criteria.
- Rules that block content run first, followed by rules to review and approve content, then rules that replace content, and last by rules that flag content. If two or more rules perform the same action, the oldest rule runs first, based on the date the rule was created. Rules to replace content don't run when the content also applies to a review rule—we want moderators to review the original content.

Tip: Before creating a rule, we recommend that you create criteria to use in the rule.

1. Open Experience Workspaces.
2. Click **Moderation** > **Rules**, then click **New** and select **Content Rule**.
3. Complete the following fields:
   - `Name`—Enter a name for your rule.
   - `Unique Name`—Enter a unique name for your rule. The unique name used by the API.
   - `Description`—Optionally, enter a description.
   - `Activate Rule`—If selected, the rule is activated.
   - `Applies To`—Specify which types of member-generated content this rule applies to. Posts and comments only apply to content created in groups and user profiles. All feed types, such as polls and links, are supported.
   - `Moderation Action`—Specify what you want to happen when the criteria is matched.
     - `Block` prevents the content from being published.

  - `Review` allows users with the Can Approve Feed Post and Comment permission to approve the content before it's published.
  - `Replace` publishes the content with the keywords replaced as asterisks. For example, *`BadWord`* becomes `*******`.
  - `Flag` publishes the content and then automatically flags the content as inappropriate.
- `Message for Member`—Specify the message that your member sees when their content is blocked. If you don't specify a message, the member sees the standard message: "You can't use *`%BLOCKED_KEYWORD%`* or other inappropriate words in this site. Review your content and try again." The *`%BLOCKED_KEYWORD%`* variable displays up to 5 blocked words. You can also use this variable in your own custom message.

  Tip: For international sites, you can translate this message. From Setup, enter *`Translate`* in the Quick Find box, then select **Translate**. To provide a translation for the message, select the Moderation Rule setup component and expand the site the rule belongs to.
- `Member Criteria`—Specify member criteria to enforce this rule. Ask yourself, who should this rule apply to?
- `Content Criteria`—Specify the content criteria to enforce this rule. Ask yourself, what specific keywords should this rule apply to?

Important: Keep the following things in mind:

- If you activate a content rule without specifying member criteria, the rule applies to all members.
- If you activate a content rule without specifying content criteria, the rule either:
  - Prevents members from creating posts and comments entirely
  - Sends all posts for review
  - Flags all posts and comments

  Yikes! Be careful.
- If you select member criteria and content criteria, the rule applies only when both criteria are met.
- Specifying criteria is optional. However, we recommend that you include criteria in your rules to target specific members and content.

4. Click **Save**.

SEE ALSO:

Translate Metadata Labels
Create Content Criteria to Moderate Your Experience Cloud Site
Create Member Criteria to Moderate Your Experience Cloud Site

Create Rate Limit Rules to Moderate Your Experience Cloud Site

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To view, create, edit, and delete rules:

- Manage Experiences OR Create and Set Up Experiences

  AND

  Is a member of the Experience Cloud site

Create and modify rate rules to monitor and limit how frequently member-generated content is created. Rate rules protect your Experience Cloud site against spammers and bots that attack your site by posting the same message multiple times in a row. You can create rate rules to notify your moderators of suspicious spammer-like behavior or freeze a member on the spot.

Each rate rule controls two actions: notification and freeze. You can set up your rate rule for both actions or just one. You can apply the rule to: posts, comments, files, and private messages. In Experience Cloud sites that use the Customer Service template, this includes questions and answers.

Some things to keep in mind:

- Your org can have up to 30 rules. This limit is per org, not per Experience Cloud site. This limit includes both content rules and rate rules.
- Each rate rule can have up to 10 member criteria.

Tip: Before creating a rule, we recommend that you create member criteria to use in the rule.

1. Open Experience Workspaces.
2. Click **Moderation** > **Rules**, then click **New** and select **Rate Rule**.
3. Complete the following fields.
   - `Name`—Enter a name for your rule.
   - `Unique Name`—Enter a unique name for your rule. The unique name used by the API.
   - `Description`—Optionally, enter a description.
   - `Activate Rule`—If selected, the rule is activated.
   - `Applies To`—Specify which types of member-generated content this rule applies to. Posts and comments only apply to content created in groups and user profiles.
   - `Member Criteria`—Specify the member criteria to enforce this rule. Ask yourself, who do I want this rule to apply to?

     Spammers are typically new members. We recommend creating member criteria that only includes customer users that were created in the last seven days.

     Note:

     - Rate rules don't apply to internal users. You can use member criteria that includes internal users, but the rules don't apply to them.
     - If you activate a rate rule without specifying member criteria, the rule applies to all external users.

   - `Content Creation Time Frame`—Select the time frame you want to use.
   - `Notify Moderators`—Enter a number. Moderators are sent an email when a member creates this much content in your set time frame.
   - `Freeze Members`—Enter a number. Members are frozen when they create this much content in your set time frame.

     Important: When members are frozen, they're frozen in all sites that they're a member of.

   Emails are sent to users with the Moderate Experience Users permission. Make sure that you assign your moderators this permission. Emails are sent even if a user has turned off Chatter emails.

4. Click **Save** to apply your changes.

Example: Let's use the following rate rule as an example.

`Applies To`: Posts and private messages

`Member Criteria`: Customer users created in the past 7 days

`Content Creation Time Frame`: 3 minutes

`Notify Moderators`: 6

`Freeze Members`: 10

With this rate rule, here's what happens when a member reaches your limits.

In the span of 3 minutes, a member creates...	Is the moderator notified?	Is the member frozen?
4 posts and 2 private messages	✓	✗
6 posts	✓	✗
6 comments	✗	✗
8 posts and 2 private messages	✓	✓
10 posts	✓	✓
10 comments	✗	✗

A rate rule with these values protects the site from spammers and bots but also allows you to help your new members. Maybe a non-threatening member posted a question over and over hoping to get it answered faster. Rate rules do more than protect—they let you help members in need.

Here's a rule set up just for private messages.

`Applies To`: Private messages

`Member Criteria`: Customer users created in the past 3 days

`Content Creation Time Frame`: 15 minutes

`Notify Moderators`: 1

`Freeze Members`: 3

This rate rule protects the site from spammers that attack via private messages.

My rate rule didn't do anything. What's going on?

Give it time. Rate limit rules might not seem exact, but they are. Trust us. For example, say you set up a rate rule to freeze members when they create content 10 times in 3 minutes. It's possible for a member to create 9 items towards the end of the first 3-minute time frame. In this case, the member isn't frozen until they post another 10 items in the second 3-minute time frame.

Check the member criteria you're using. For example, let's say you have a rate rule that uses member criteria to filter for members without contributions. After a member's first post or comment, the rule doesn't apply to the member anymore, so the member doesn't reach the freeze limit you set.

SEE ALSO:

Create Member Criteria to Moderate Your Experience Cloud Site

How and when do Experience Cloud site moderation rules execute?

Rules that block content run first, followed by rules to review and approve content, then rules that replace content, and last by rules that flag content.

If two or more rules perform the same action, the oldest rule runs first, based on the date the rule was created. Rules to replace content don't run when the content also applies to a review rule—we want moderators to review the original content. On the server, Salesforce executes Experience Cloud site rules within the standard order of execution.

Rules that block content execute during system validation. Rules that block content ignore changes made by `before` triggers. For example, if a `before` trigger changes a feed post, a moderation rule that blocks content isn't aware of the changed content and executes on the original content.

Rules to review and approve content execute before database saves. These rules execute before rules that replace content.

Rules that replace content execute before database saves.

Rules that flag content execute after workflow rules.

SEE ALSO:

Apex Developer Guide: Triggers and Order of Execution

Enable Record Feed Moderation

Run moderation rules on comments or posts on any record feed that is visible from within an Experience Cloud site. Record feed moderation ensures that member posts or comments stay within the guidelines of the site.

Members can post or comment on any record types that have a feed. The moderation rules configured for your Experience Cloud site catch any posts or comments that don't meet the rules' criteria. Flags on a record feed are only visible from within the site that flags them. You can also turn off moderation rules for internal users so that their feed activity isn't flagged.

1. In Setup, go to **Digital Experiences** > **Settings**.
2. In the Moderation Rule Settings section, select **Moderation applies to all feed posts regardless of where they are visible**.
3. Click **Save**.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To view, create, edit, and delete rules:

- Create and Set Up Experiences

  AND

  Is a member of the Experience Cloud site

Review and Approve Posts and Comments in Your Experience Cloud Site

Moderation rules to review and approve content ensure that non-compliant and inappropriate content isn't immediately visible to everyone in your Experience Cloud site. Posts and comments pending review aren't displayed in the feed; only the author and moderators can see pending posts and comments in the feed. An author can see a pending comment on a pending post only if the author posted both. After you set up the rules, moderators can approve content directly in the feed and in Experience Workspaces.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

> Note: The Can Approve Feed Post and Comment permission applies not only to moderation but also to any Chatter feed a user can access. In other words, an assigned user can edit or delete any post or comment. They can take these actions whether in an Experience Cloud site or their internal Salesforce org, in any feed they have access to.

USER PERMISSIONS

To approve, delete, or edit posts and comments that are pending review:

> Note: An author can see a pending comment on a pending post only if the author posted both.

- Can Approve Feed Post and Comment

To approve, delete, or edit posts and comments that are pending review:

- Can Approve Feed Post and Comment

  AND

  Access Experience Management OR Manage Experiences OR Create and Set Up Experiences

  AND

  Is a member of the Experience Cloud site

To set up a moderation rule to review and approve posts and comments, in Experience Workspaces, go to **Moderation** > **Rules** and create a content rule that uses the `Review` action. Here are some ways that you can use rules to review content.

Self-Service

Does your site allow members to self-register? You can set up a rule to review and approve questions from all your self-registering users. Use member criteria that includes only your guest user profile and filters for members who were created in the past seven days.

Have spammers ever attacked your site? Use member criteria that includes only your guest user profile and filters for members that have never contributed.

Partners

Want to ensure that your partners aren't discussing a recent acquisition or other sensitive transactions? You can set up a rule to review posts and comments that include keywords such as "acquisition" or "merger."

Employees

Does your site require HIPAA compliance? Set up your rules to review posts and comments from all your employees.

> Note: Users must have Manage Experiences or Create and Set Up Experiences permissions to create moderation rules.

Pending Review is displayed in the header of the post or comment until it's approved. Remember that while a post or comment is pending approval, the author can still edit or delete it, however they can't comment on it. An author can see a pending comment on a pending post only if the author posted both. To prevent the author from editing the post or comment, you can disable feed post editing for certain users.

There are two ways to review and approve posts and comments.

- Use the preconfigured Pending Discussions Insights report on the Moderation Overview page in Experience Workspaces.

  To get this report, install the Salesforce Communities Management (for Communities with Chatter) package from the AppExchange. Use the Pending Discussions report to see all the posts and comments that are pending review. The report displays the contents of posts and comments so you can quickly assess whether that content is spam or harmless. You can then approve or delete the item directly from the report. You can also perform mass-action and approve multiple items at once.

- Approve posts and comments directly in the feed.

In the feed, users with the Can Approve Feed Post and Comment permission see an extra action in the post or comment dropdown menu. If the item is inappropriate, they can delete it. If it has a typo, they can edit it.

After the item is approved, the author receives an email letting them know the item is approved and providing a link to it. Email notifications, such as @mentions notifications, are sent only after the item is approved.

SEE ALSO:

Create Content Rules to Moderate Your Experience Cloud Site

Feed Post and Comments Editing Overview

Moderate Flagged Posts and Comments in Your Experience Cloud Site

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To view flagged items, remove flags, and delete posts or comments:

- Moderate Experiences Feeds

To moderate posts and comments:

- Access Experience Management OR Moderate Experiences Feeds

  AND

  Manage Experiences OR Create and Set Up Experiences

  AND

  Is a member of the Experience Cloud site

Moderators can review a list of posts and comments that members have flagged as inappropriate and act on them. Group owners or group managers, can view flags and act on items in their groups.

Flagged posts and comments have a small orange flag next to the post or comment date. The number next to the flag indicates how many people have flagged the item. The moderator can review each item and act on it.

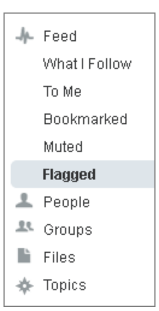
A few things to keep in mind:

- Moderators can view and act on only items they have access to.
- Within a group, group owners or managers can moderate items in their groups, including viewing or removing flags and deleting posts, comments, or files.
- If `Allow members to flag content` is disabled, only moderators can flag items and view flagged items.

There are a few ways you can moderate flagged posts and comments.

- View flagged posts and comments from the Flagged Discussions tile on the Moderation Overview page in Experience Workspaces.
- Use the flagged feed in Chatter.

  If you're using a Salesforce Tabs + Visualforce Experience Cloud site, you can see a list of flagged posts and comments using the Chatter menu. The `Allow members to flag content` preference must be enabled to see the Flagged feed.

- Moderate using a custom list. You can expose a list of flagged posts and comments using Connect REST API or ConnectApi in Apex.
- Click the link to the post or comment from the notification email.
- Moderate directly within context of the Experience Cloud site by removing flags or deleting content in the feed.

Tip: To receive an email each time an item is flagged, select **Flags an item as inappropriate** on your Email Settings page.

SEE ALSO:

Connect REST API Developer Guide: Experience Cloud Sites Moderation Resources

Apex Reference Guide: CommunityModeration Class

Moderate Flagged Discussions in Your Experience Cloud Site

Moderators can delete and unflag posts and comments from discussions, and freeze or communicate with the author of those posts, all from one place.

Moderators can view an entire discussion in context (including all comments related to a post) and sort by the newest discussions or the oldest. Click **View Discussion** to open a discussion thread.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To view flagged items, remove flags, and delete posts or comments:

- Moderate Experiences Feeds

To moderate posts and comments:

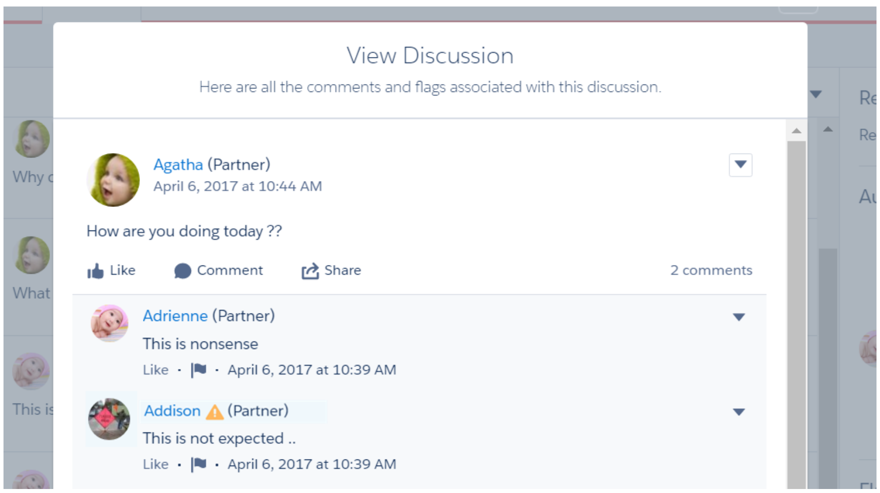
- Access Experience Management OR Moderate Experiences Feeds

  AND

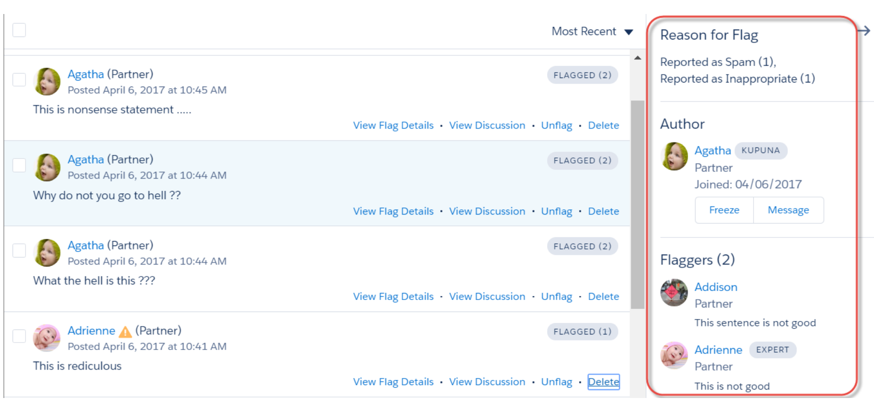
  Manage Experiences OR Create and Set Up Experiences

  AND

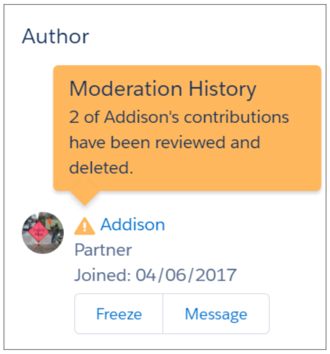
  Is a member of the Experience Cloud site



Click a post or comment or select **View Flag Details** to see how a post or comment has been flagged and who flagged it.



Want to know more about the author of a flagged post? We've got you covered. You can see which authors have a history of flagged posts and how many times a moderator has deleted their posts. If necessary, freeze the author and send them a message from the same page.



A few things to keep in mind:

- The Flagged Discussions tile is available on the Moderation Overview page in Experience Workspaces.
- Moderators can view and act on only items they have access to.
- Within a group, group owners or managers can moderate items in their groups, including viewing or removing flags and deleting posts, comments, or files.
- If `Allow members to flag content` is disabled, only moderators can flag items and view flagged items.

Moderate Flagged Files in Your Experience Cloud Site

Moderators can review and respond to a list of files that members have flagged as inappropriate or spam. Group owners or group managers can view flags and respond to files in their groups.

Members can post files that aren't appropriate because they contain sensitive information or offensive content. Other members can flag these files for review. Flagged files have a small orange flag. The number next to the flag indicates how many people have flagged the item.

A few things to keep in mind:

- Moderators can only view and act on items they have access to.
- When `Allow members to flag content` is enabled, group owners and managers can review and remove flags on files in the groups that they own and manage.
- If `Allow members to flag content` is disabled, only moderators can flag items and view flagged items.

There are a few ways you can moderate flagged files:

- Use the preconfigured Flagged Files Insights report on the Moderation Overview page in Experience Workspaces.

  To get this report, install the Salesforce Communities Management (for Communities with Chatter) package from the AppExchange. Use the Flagged Files report to see the name of the flagged file, who created it, who flagged it, and how many flags the file has. You can click a link to open the file and review the content. Then you can remove the flag or delete the file. You can also select multiple items at once.

- Moderate using a custom list. You can expose a list of flagged files using Connect REST API or ConnectApi in Apex.
- Moderate directly within context of the Experience Cloud site by removing flags or deleting content on the file detail page.

Tip: To receive an email each time an item is flagged, select **Flags an item as inappropriate** on your Email Settings page.

To limit the size and types of files allowed in your site, go to **Administration** > **Preferences**.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To view the file detail page, remove flags, and delete files:
- Moderate Experiences Files

To moderate files:
- Moderate Experiences Files

  AND

  Access Experience Management OR Manage Experiences OR Create and Set Up Experiences

  AND

  Is a member of the Experience Cloud site

SEE ALSO:

Connect REST API Developer Guide: Experience Cloud Sites Moderation Resources

Apex Reference Guide: CommunityModeration Class

Moderate Flagged Direct Messages in Your Experience Cloud Site

Members can flag messages in Experience Cloud sites built using the Customer Service (Napili) template. Moderators can review and act on a list of direct messages that members have flagged as inappropriate or spam.

> Note: Private messages and direct messages are separate features. Direct messages are newer and offer a richer feature set for private communication. Direct messages are based on Chatter and offer a rich text editor that supports inline images and attachments. With direct messages, you can start a message right from a feed post.

The Moderate Experiences Chatter Messages permission allows moderators to see the contents of flagged direct messages, remove flags, and delete flagged messages.

1. If you haven't already, install the Salesforce Communities Management (for Communities with Chatter) package from the AppExchange.
2. Open Experience Workspaces.
3. Select **Moderation** and either click the Flagged Direct Messages tile or click **Moderate** > **Flagged Messages** to see the flagged items.
4. Review and act on the flagged messages.

> Tip: If you want to receive an email each time a message is flagged, select the **Flags an item as inappropriate** option on the Email Settings page. To receive emails, you must have the Moderate Experiences Chatter Messages and Manage Chatter Messages and Direct Messages permissions. To set your email preferences, click on your profile picture within an Experience Cloud site and click **Settings** > **My Email Settings**.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To view and moderate flagged direct messages:
- Moderate Experiences Chatter Messages

  AND

  Moderate Chatter Messages and Direct Messages

  AND

  Moderate Experiences Feeds

  AND

  Access Experience Management OR Manage Experiences OR Create and Set Up Experiences

  AND

  Is a member of the Experience Cloud site

To make all posts available to moderation, including direct messages, in Digital Experiences Settings under Moderation Rule Settings:
- Moderation applies to all feed posts regardless of where they are visible

Moderate Flagged Private Messages in Your Experience Cloud Site

Moderators can review and act on a list of Chatter messages that members flagged as inappropriate or as spam.

The Moderate Experiences Chatter Messages permission allows users to see the contents of messages, remove flags, and delete messages only in Experience Cloud sites they're a member of. With this permission, only flagged messages can be deleted. The Modify All Data permission allows moderators to remove flags or delete a message in the SOAP API.

Ensure that your moderators are assigned the Moderate Experiences Chatter Messages permission, *not* the Manage Chatter Messages permission. The Manage Chatter Messages permission allows users to see *all* the messages in your entire Salesforce org. Avoid security and privacy concerns; double-check that your moderators and managers have the right permission.

Important: Keep these limitations in mind:

- Members can't flag messages sent from sites that they aren't a member of or that haven't turned on flagging for their users.
- Users can't flag messages in your internal org, in the Salesforce mobile app, or in partner and customer portals.

There are a few ways to monitor and manage flagged messages.

- Use the preconfigured Flagged Private Messages Insights report from the Moderation Overview page in Experience Workspaces.

  To get this report, install the Salesforce Communities Management (for Communities with Chatter) package from the AppExchange. Use the Flagged Private Messages report to track trends and stay on top of message spamming attacks. You can view who sent the message, the contents of the message, when it was sent, and who flagged the message. You can use this report to remove flags from messages and delete messages.

- Create your own report.

  First, create a custom report type using `Networks` as the primary object and `Network Audits` as the secondary object. Then create a report using your new custom report type and add a field filter for `Audited Object Type` set to equal `Chatter Message`. Use the API to delete flagged messages.

- Directly query the flagged messages from the API and then delete them.

Tip: If you want to receive an email each time a message is flagged, select the **Flags an item as inappropriate** option on the Email Settings page. To receive emails, you must have the Moderate Experiences Chatter Messages and Moderate Experiences Feeds permissions. To set your email preferences, click your profile picture within the Experience Cloud site and click **Settings** > **My Email Settings**.

SEE ALSO:

Guidelines for Deleting Your Users' Chatter Messages

Report on Experience Cloud Sites with AppExchange Packages

SOAP API Developer Guide: ChatterMessage

Apex Developer Guide: Moderate Chatter Private Messages with Triggers

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To moderate messages:
- Moderate Experiences Chatter Messages

  AND

  Access Experience Management OR Manage Experiences OR Create and Set Up Experiences

  AND

  Is a member of the Experience Cloud site

To view the contents of a flagged message in reports:
- Moderate Experiences Chatter Messages

To remove flags or delete messages in the SOAP API:
- Modify All Data

Set Up Apex Triggers for Flagging Items

Use triggers to create custom advanced moderation logic that automatically flags items in your Experience Cloud site.

Tip: Did you know you can do this in the UI? Most sites don't need custom moderation triggers. You can create moderation rules and criteria directly in Experience Workspaces. For more information, see Experience Cloud Site Moderation Rules.

Using triggers to automatically flag items allows you to moderate your Experience Cloud site behind the scenes. These flags are **only** visible to moderators. You can view flags in Experience Workspaces., 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 FeedItem, FeedComment, ChatterMessage, or ContentDocument.
- Define criteria that when met creates a NetworkModeration (flag) record, with the FeedComment, FeedItem, ChatterMessage, or ContentDocument as the parent.

Example: This trigger automatically flags posts in your site that contain *BadWord*.

```
trigger autoflagBadWordOnPost on FeedItem (after insert) {

    List<NetworkModeration> flags = new
List<NetworkModeration>();

    for (FeedItem rec : trigger.new) {
        if (!<NetworkId>.equals(rec.networkScope)){
            continue;
        }

        if (rec.body.indexOf('BadWord') >= 0) {
            NetworkModeration nm = new
NetworkModeration(EntityId = rec.id, Visibility =
'ModeratorsOnly');
            flags.add(nm);
        }
    }

    if (!flags.isEmpty()) {
        insert(flags);
    }
}
```

A similar trigger on comments would look like this.

```
trigger autoflagBadWordOnComment on FeedComment (after insert)
 {
    List<NetworkModeration> flags = new
List<NetworkModeration>();

    for (FeedComment rec : trigger.new) {
        if (!<NetworkId>.equals(rec.networkScope)) {
            continue;
```

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create triggers:

- Modify All Data

```
        }

        if (rec.commentBody.indexOf('BadWord') >= 0) {
            NetworkModeration nm = new NetworkModeration(EntityId = rec.id, Visibility
 = 'ModeratorsOnly');
             flags.add(nm);
        }
    }

    if (!flags.isEmpty()){
        insert(flags);
    }
}
```

SEE ALSO:

SOAP API Developer Guide

Experience Pulse

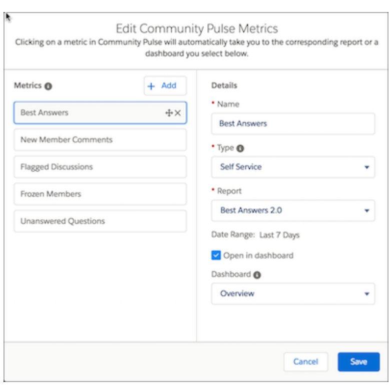
Experience Pulse displays metrics at the top of Workspaces. Click a metric to open the corresponding report or dashboard for more information or to take action. Customize the displayed metrics or create ones to meet your needs.

To get started, map reports and dashboards to your Experience Workspaces. You can either map manually or install the Winter '18 or later version of the AppExchange package. After installation, Experience Pulse displays automatically. If you have an Experience Cloud site with Chatter, four tiles display after you install the package: Members, New Members, Unanswered Questions, and Flagged Discussions.

EDITIONS

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

To customize a metric tile, click **Edit Metrics**. From here, create a metric or edit an existing one. You can have up to six metrics at a time.



By design, clicking a metric opens the corresponding report. However, selecting **Open in dashboard** lets you open a dashboard instead.

SEE ALSO:

Enable and Map Dashboards

Enable and Map Engagement Insights

Experience Cloud Site Moderation Limits and Limitations

Moderation limits ensure that your Experience Cloud site performs optimally.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Criteria Limits

- Your org can have up to 30 keyword list criteria. This limit is per org, not per Experience Cloud site.
- Your org can have up to 100 member criteria. This limit is per org, not per Experience Cloud site.

Rule Limits and Limitations

- Your org can have up to 30 rules. This limit is per org, not per Experience Cloud site. This limit includes both content rules and rate rules.
- Moderation rules apply only to feed posts, comments, and polls. Moderation rules do not apply to topics that are created.

Audit Limitations

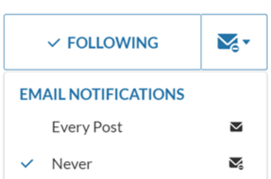
Changes to a feed item's status are not included in the Insights report.

Organize Experience Cloud Sites with Topics

Navigational, featured, and content topics are a fantastic way to organize information and content in an Experience Cloud site. Use topics to structure your site's content or highlight key discussions. You can create topics or use the topics that organically emerge from site member posts.

Choose navigational topics and subtopics to provide a consistent map of your site. Use featured topics to highlight current, popular conversations. Use content topics to organize your original content. In the site itself, member-created topics let users organize information for each other, creating a personalized experience that boosts site engagement.

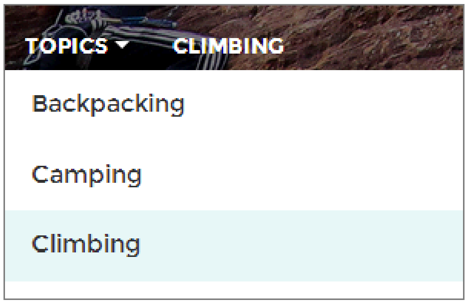
Site members can keep up-to-date on topics by following them and, optionally, receiving email notifications for topics they follow.



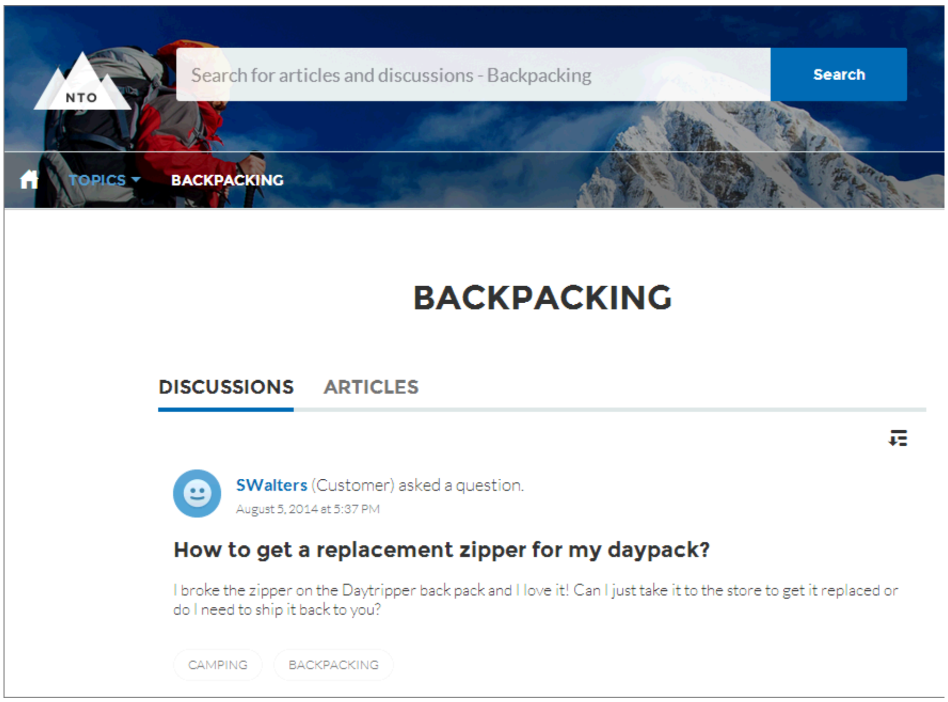
When members choose Every Post, they get notifications when a post or question is added to the topic. They don't get notifications when the hashtag topic is added to a comment, answer, or record feed.

Navigational Topics

On every page of a site, navigational topics are available from the Topics menu at upper left. Site members can also see all the site's navigational topics and subtopics in one place in the topic catalog.



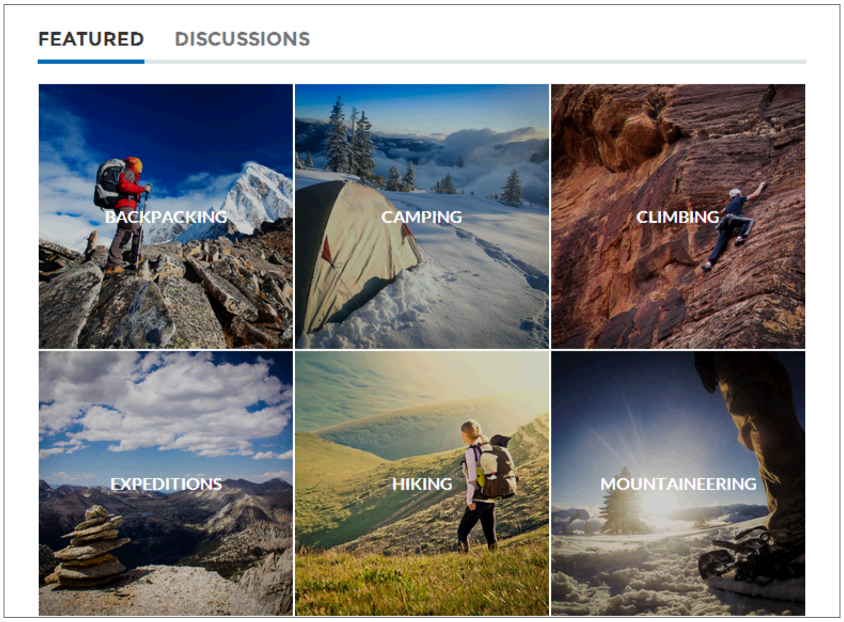
When visitors choose a navigational topic, the banner image you selected for it appears at the top of the page.



Note: Properties on the Ask and Contact Support & Ask components let you block selection of a new topic when a user asks a question. For more information, see Ask Button and Contact Support & Ask Buttons.

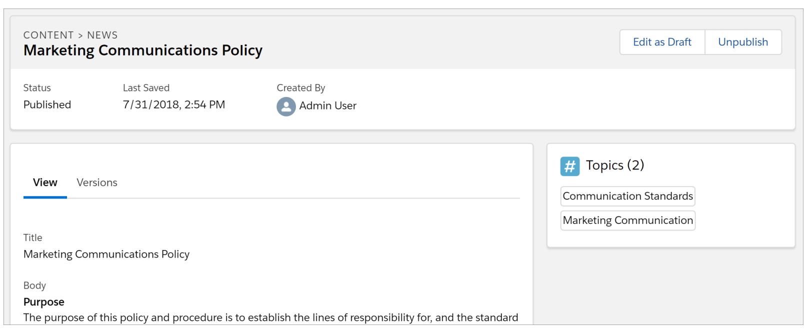
Featured Topics

Featured topics are accessible from the body of your site 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 Experience Builder appears.)



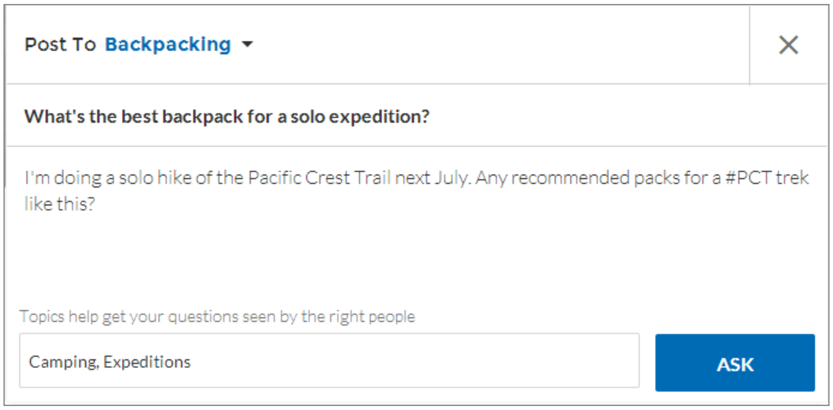
Content Topics

Content topics allow you to organize your original content around common themes. Enable topics that you're already using for content, or create topics and enable them for content. After topics are enabled for content, assign them to your native content.



Member-Created Topics

When posting questions, site members create topics by using hashtags in body text, or typing in the topic suggestions box. (In Setup, the "Assign Topics" and "Create Topics" permissions must be enabled for site users.)



If any suggested topics are poor matches for the post, members can simply click to delete them.

Tip: Member-created topics can be accessed via search or highlighted as featured topics.

Topic Metrics

Site members can check how often a topic has been used in the past 60 days and how many followers it has. Find metrics on a topic's detail page. With this information at their fingertips, site members know how current and popular a topic is. Admins can also use these metrics to highlight certain topics in their sites or consolidate similar topics based on usage.

IN THIS SECTION:

Manage Topics in Experience Cloud Sites

As the number of topics in an Experience Cloud site grows, curate them to improve usability. You can create, merge, rename, enable for content, and delete topics in one convenient location.

Automatically Assign Topics to Articles

Transport all your hard work of organizing Salesforce Knowledge in your Experience Cloud site by mapping topics to data categories. All articles published with a specific data category are tagged with the topics you specify. Articles added to the data category in the future are also tagged.

Set Up Featured Topics

Featured topics highlight current, popular conversations in your Experience Cloud site. Change them regularly to keep members up-to-date and engaged.

Set Up Navigational Topics

Structure your Experience Cloud site's content and help your users find what they need with navigational topics. If your org uses data categories, community managers can link current Salesforce Knowledge articles associated with those categories to each navigational topic. If data categories aren't enabled, administrators can add articles to each topic using Connect REST API.

Set Up Content Topics

Content topics organize your original content around common themes for your Experience Cloud site.

See Your Site's Topics and Subtopics in One Place

You've gone through the exhaustive task of adding topics and various levels of subtopics to your Experience Cloud site's content. Now you want your site members to see all the organized topics in one place, so they can navigate to any subject their hearts desire. Fear not! They can see everything in your site's topic catalog.

Add Topics to Articles or Remove Them

Easily add multiple topics of any type to specific articles, or quickly remove them as your Experience Cloud site's needs change.

Translate Topics Names and Descriptions for Experience Cloud Sites with International Audiences

Use the Translation Workbench to translate topic names and descriptions in international Experience Cloud sites.

Manage Topics in Experience Cloud Sites

USER PERMISSIONS	
To access Experience Workspaces or Experience Management page:	Manage Experiences OR Create and Set Up Experiences
To create topics:	Create Topics
To merge topics:	Merge Topics AND Delete Topics AND Edit Topics AND Assign Topics
To delete topics:	Delete Topics
To edit topics:	Edit Topics

EDITIONS
Available in: Salesforce Classic (not available in all orgs) and Lightning Experience
Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

As the number of topics in an Experience Cloud site grows, curate them to improve usability. You can create, merge, rename, enable for content, and delete topics in one convenient location.

1. In Experience Workspaces, access topics by clicking **Content Management** > **Topics**.
2. Do one of the following.
   - To create a topic (often with a plan to merge existing ones into it), click **New**. To boost SEO, add a name and a topic description. If you want to be able to associate the topic with native content, select **Enable for content**.
   - To combine topics, click **Merge**.

     Merging a topic automatically redirects existing hashtags in posts. If you merge a navigational or featured topic, the topic type, image, and any subtopic relationships are discarded. If you merge a topic with a content topic, the content associations are preserved. If you merge a topic with an inactive endorsee, the endorsement is discarded.
   - To enable up to 10 topics for content at the same time, select the topics and click **Enable for Content**.

     After enabling topics for content, you can associate the topics with your native content.
   - To edit a topic, click and select **Edit**.

     If you deselect **Enable for content** when editing a topic that is associated with content, saving your changes removes the associations.
   - To see a topic detail page in your site, click the topic name.
   - To delete a topic, click and select **Delete**.

   If you don't see a topic you're looking for, you can search for it.

Tip: For sites with a global audience, you can translate names and descriptions of topics.

SEE ALSO:

- Set Up Navigational Topics
- Set Up Featured Topics
- Set Up Content Topics

Automatically Assign Topics to Articles

Transport all your hard work of organizing Salesforce Knowledge in your Experience Cloud site by mapping topics to data categories. All articles published with a specific data category are tagged with the topics you specify. Articles added to the data category in the future are also tagged.

To use automatic topic assignments, enable Experience Workspaces in Digital Experience Settings.

1. Open Experience Workspaces.
2. Access automatic topic assignments by clicking **Content Management** > **Topics** > **Automatic Topic Assignment**.
3. Enable **Automate Topic Assignment**.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To access Experience Workspaces:

- Manage Experiences

  OR

  Create and Set Up Experiences

  AND

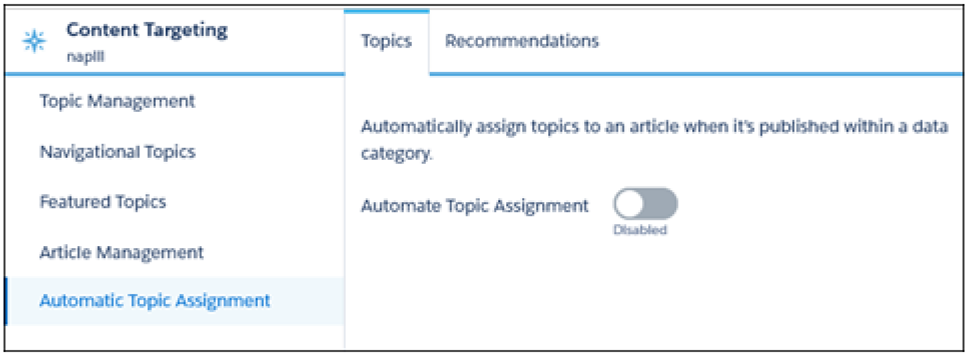
  Is a member of the site

To set up automatic topic assignments:

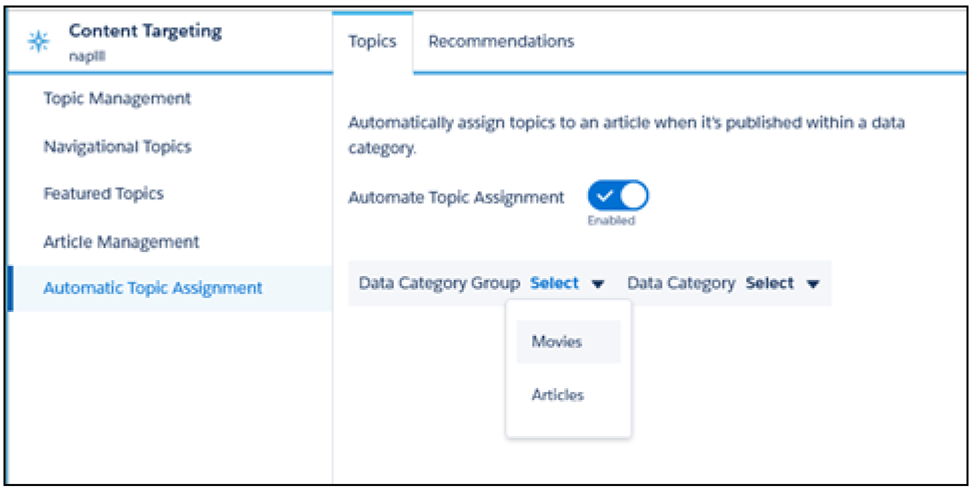
- Edit Topics

  AND

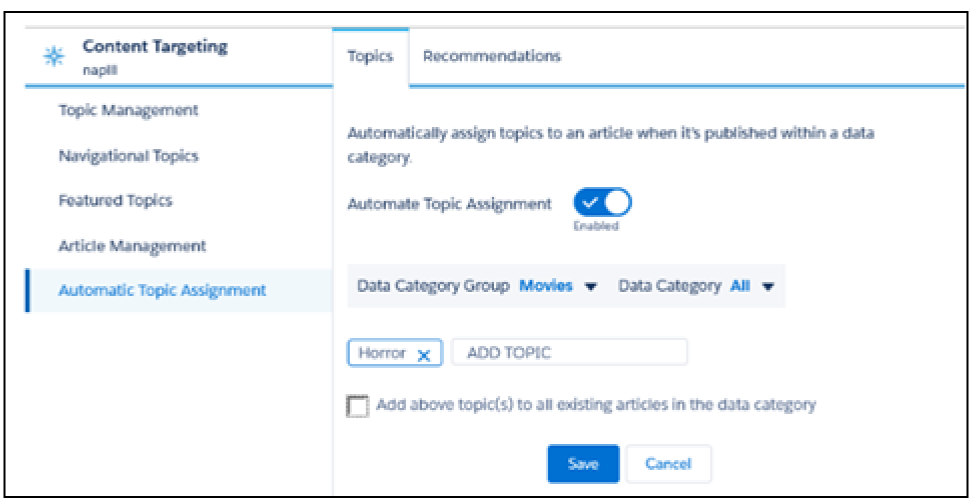
  View Data Categories



4. Select a data category group and a data category.



5. Add the topics that you want to assign to the articles under that data category.



6. Select the option to add the topics to existing articles in the data category. The topics are then assigned to all articles in all data categories under the data category group. If you don't select this option, the topics are added only to new articles added to the data category, and the existing articles remain unchanged.
7. Click **Save**.

Consider the following as you set up your topic assignment rules.

- Topic assignments are site-specific. If you use the same article in two different sites, set up automatic assignments in both sites.
- If a translation of a topic is available in Salesforce, the translated article is tagged with the corresponding translated topic. If there's no translated topic in the system, localized articles are tagged with the base language topic.
- You can't automatically remove topics from articles. Instead, you must manually remove topics.
- If you merge two topics, you must set up new rules.
- If you automatically add a topic to a data category, the topic is added to all articles in the data categories above it in the hierarchy. Topics aren't automatically added down a hierarchy to child data categories.

Set Up Featured Topics

Featured topics highlight current, popular conversations in your Experience Cloud site. Change them regularly to keep members up-to-date and engaged.

1. In Experience Workspaces, access featured topics by clicking **Content Management** > **Topics** > **Featured Topics**.
2. Enter the first few letters of the topic name in the search box. Select a suggested topic and click **Add**. Use navigational or member-created topics.

   Tip: Using Connect REST API, you can create unique featured topics that are separate from navigational or member-created ones.

3. Hover over a topic name, and click ✎. Then click **Upload thumbnail image**, and select an image that represents the featured topic on the site home page.

   Thumbnail images are scaled to 385 x 385 pixels. To prevent distortion, create image files with those dimensions.

   To ensure guest users can see featured topic images in your site, select Let guest users view asset files and CMS content available to the site in **Administration** > **Preferences** in Experience Workspaces. This selection also allows guest users to see images associated with recognition badges, site branding, and account branding.

4. Repeat steps 3 and 4 to create several featured topics for your site, up to a maximum of 25. Then click **Save**.

To edit featured topics, hover over a topic name.

- To move topics up or down, click the arrows at left.
- To delete topics or change their thumbnail images, click ✎.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To access Experience Workspaces or Experience Management page:
- Manage Experiences

  OR

  Create and Set Up Experiences

  AND

  Is a member of the site

To set up featured topics:
- Edit Topics

To create, edit, and delete images for featured topics:
- Create, Edit, and Delete on the image record

Set Up Navigational Topics

Structure your Experience Cloud site's content and help your users find what they need with navigational topics. If your org uses data categories, community managers can link current Salesforce Knowledge articles associated with those categories to each navigational topic. If data categories aren't enabled, administrators can add articles to each topic using Connect REST API.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To access Experience Workspaces or Experience Management page:
- Manage Experiences

  AND

  Create and Set Up Experiences

  AND

  Is a member of the site

To set up navigational topics:
- Create Topics

  AND

  Edit Topics

To add articles to topics:
- View Data Categories

  AND

  Read on related article types

1. From Setup, enter `Topics for Objects` in the Quick Find box, then select **Topics for Objects**.
   a. In Classic Knowledge, enable topics for all the article types you want to include.
   b. In Lightning Knowledge, enable topics for Knowledge.

   Note: Enabling topics disables public tags on articles. Personal tags aren't affected.

2. Open Experience Workspaces.
3. In Experience Workspaces, access navigational topics by clicking **Content Management** > **Topics** > **Navigational Topics**.
4. In the text box at right, enter a topic name, and click **Add**. Want to add subtopics? After you add a topic, choose your topic from the dropdown menu (under Show subtopics of). To add a subtopic, add another topic and click **Add**. You can add up to two levels of subtopics for each parent topic.
5. If your org 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 Experience Workspaces and repeat the previous step.

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.

   To ensure guest users can see navigational topic images in your site, select Let guest users view asset files and CMS content available to the site in **Administration** > **Preferences** in Experience Workspaces. This selection also allows guest users to see images associated with recognition badges, site branding, and account branding.

7. Repeat steps 4–6 to create several navigational topics for your site. Then click **Save**.
8. Use subtopics to further categorize your content. Associate articles for each set of subtopics for a more granular organization. This table shows the maximum number of navigational topics and subtopics you can create in the UI of a Customer Service site.

Level	Maximum Number of Entries
One (parent)	25
Two (subtopic)	10
Three (subtopic)	10

With Connect REST API or Connect in Apex, you can create an additional five levels, each with 10 subtopics, for a total of 2,775 navigational topics.

Tip: To edit navigational topics, hover over a topic name.

- To move a topic up or down, click the arrows at left.
- To rename or remove a topic, change its banner image, or remove assigned articles, click .

SEE ALSO:

See Your Site's Topics and Subtopics in One Place

Set Up Content Topics

Content topics organize your original content around common themes for your Experience Cloud site.

EDITIONS

Available in: Lightning Experience

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To access Experience Workspaces page:
- Manage Experiences

  OR

  Create and Set Up Experiences

  AND

  Is a member of the site

To set up content topics:
- Create Topics

  AND

  Edit Topics

1. Open Experience Workspaces.

   You can view and edit content topics in Experience Management, but you can't create content topics or enable topics for content in Experience Management.
2. Access topics by clicking **Content Management** > **Topics**.
3. Select **All Topics** > **All Content Topics**.
4. To create a content topic, click **New**.
5. Enter a name and description. Select **Enable for content**.
6. Repeat steps 4 and 5 to create several content topics for your Experience Cloud site, up to a maximum of 5,000.

   Alternatively, use the All Topics list and select up to 10 topics at a time and click **Enable for Content**.

After a topic is enabled for content, you can associate the topic with your native content.

To edit or delete a content topic, click in the topic row and select **Edit** or **Delete**.

See Your Site's Topics and Subtopics in One Place

You've gone through the exhaustive task of adding topics and various levels of subtopics to your Experience Cloud site's content. Now you want your site members to see all the organized topics in one place, so they can navigate to any subject their hearts desire. Fear not! They can see everything in your site's topic catalog.

The topic catalog shows the hierarchy of navigational topics you've created for the Experience Cloud site. It's only visible after you set up navigational topics, and it's accessed from the navigation menu.

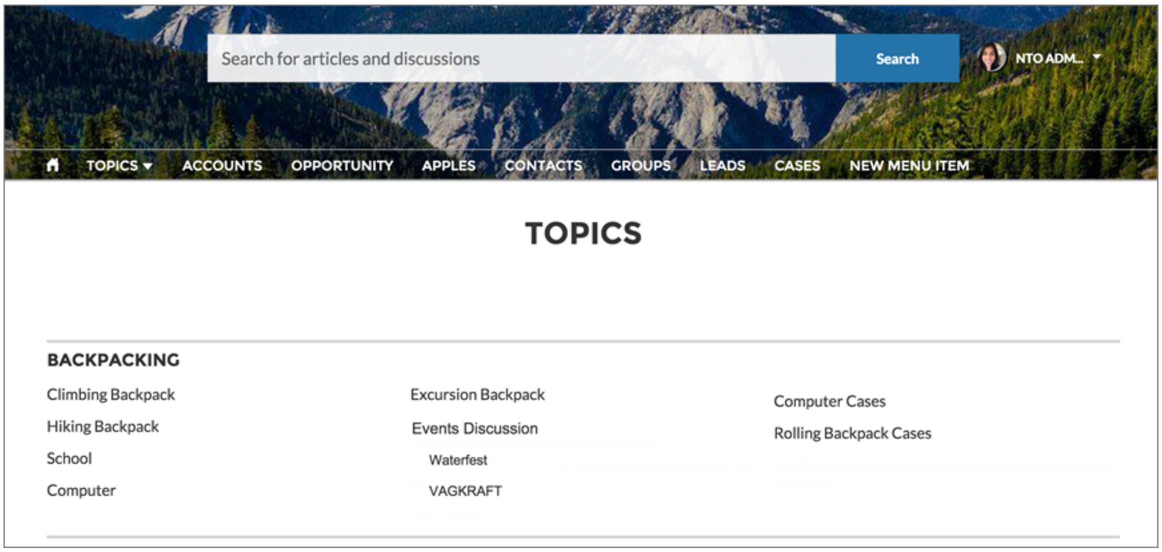
How is the topic catalog useful to your site members?

- New and returning users look at all the organized topics in one place, getting a lay of the land before diving deeper into a specific topic.
- Any site user can use the topic catalog as a jumping point to go from topic to topic.

To set up the topic catalog, select **Add the "More Topics..." link** when editing the navigation menu on the home page. The link appears when you have at least one subtopic.

You can also see an article or discussion's placement in the topic hierarchy using breadcrumbs. To show breadcrumbs on your site's pages, drag the Breadcrumb component to the page in Experience Builder.

Example:



SEE ALSO:

Set Up Navigational Topics

Add Topics to Articles or Remove Them

Easily add multiple topics of any type to specific articles, or quickly remove them as your Experience Cloud site's needs change.

1. In Experience Workspaces, access topics by clicking **Content Management** > **Topics** > **Article Management**.
2. Use the search bar to look for articles. Filter your search by selecting a data category group, followed by a specific category.
3. Click an article, and then type to assign topics. Choose a suggested topic or type a new one. Type a comma (,) after your new topic to add it to the article. You can click existing topics to remove them.

Note: To automatically add the translated version of a topic to translated articles, the translated topics and articles must already be uploaded in the system. Otherwise, the translated article is tagged with the English topic.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To access Experience Workspaces or Experience Management page:

- Manage Experiences

  OR

  Create and Set Up Experiences

To add or remove topics:

- Create Topics

Translate Topics Names and Descriptions for Experience Cloud Sites with International Audiences

Use the Translation Workbench to translate topic names and descriptions in international Experience Cloud sites.

1. From Setup, enter *`Translate`* in the `Quick Find` box, then select **Translate**.
2. Select the language you're translating into.
3. Select **Managed Topic** for the Setup Component.
4. For Aspect, select **Field Label** for the topic name, and **Description** for the topic description.
5. In the Experience Name column, expand a site to see its master topic names.
6. To enter language-specific names for topics, double-click in the Topic Name Translation column. For descriptions, double-click in the Topic Description Translation column.

   Consider the following when you're using the Translation Workbench:

   - There's no Metadata API support for translated topic names or descriptions.
   - While topic name uniqueness is guaranteed in English, the translator must ensure the uniqueness of topic names in the translated language.
   - Modifying topic names from Experience Workspaces or Experience Management only changes the English site. All translated topic name and description changes must be made using the Translation Workbench.
   - If a translated topic name is entered when the site is in English mode, the translated name can appear twice in the translated site.
   - When topics names are translated with the Translation Workbench, hashtags in the translated sites also change. For example, #help shows as #aiuto in Italian. If the site member then reverts to English from Italian, clicking the #aiuto hashtag gives an error message rather than showing the topic detail page of #help.
   - When viewing the topic detail page of a translated topic, the browser tab doesn't show the translated topic name.

   Note: To automatically add the translated version of a topic to translated articles, the translated topics and articles must already be uploaded in the system. Otherwise, the translated article is tagged with the English topic.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To translate topics:
- View Setup and Configuration

  AND

  Be designated as a translator

Customize Recommendations in Experience Cloud Sites

Create recommendations to drive engagement for your Experience Cloud site, encouraging users to watch videos, take trainings, and more. Target specific audiences and use channels to specify locations for the recommendations.

Note: Recommendation audiences and personalization audiences are different features. For a more updated content targeting experience, we suggest using CMS collections and personalization audiences.

1. In Experience Workspaces, select **Content Management** > **Recommendations**.
2. Select **Default Channel** or one of the custom channels.

   A channel is a way to group recommendations together so you can determine where they show up in the site.

   Default Channel

   Recommendations in the default channel appear in predefined locations, such as the Home and Question Detail pages in Customer Service and Partner Central templates.

   Custom Channel

   You choose the pages where you want these recommendations to appear. In Experience Builder, add the Recommendations Carousel component to the page where you want the recommendation to appear. Use the property editor to specify the custom channel with the recommendation.

   Using a custom channel, you could surface a recommendation to review specific knowledge articles on a product description page to guide customers to more information.

   If you want to change the channel of a recommendation, delete the recommendation and recreate it in a different channel.

3. Click **New**.
4. Complete the following fields:
   - `Name`—Enter a name for the recommendation. This name doesn't appear in the site.
   - `Image`—Click **Upload Image** to include an image with your recommendation.
   - `Title`—Optionally, enter header text that appears above the image.
   - `Description`—Enter detailed text that suggests what users can do.
   - `Button text`—Enter a label for the button in the recommendation.
   - `https://`—Enter the URL that the button opens.

     The URL can contain context variables to pass information about the user who clicked the recommendation and the context in which it was clicked. For example, include a `{!userId}` context variable in your URL, `https://www.example.com/doSurvey?userId={!userId}`. When a user clicks the button in the recommendation, Salesforce sends the ID of that user to your server in the HTTP request.

     Recommendations support these context variables.

Context Variable	Description
`{!actionLinkId}`	The ID of the recommendation link that the user clicked.
`{!actionLinkGroupId}`	The ID of the recommendation link group containing the recommendation that the user clicked.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To access Experience Workspaces or Experience Management:
- Manage Experiences

  OR

  Create and Set Up Experiences

Context Variable	Description
`{!communityId}`	The ID of the site in which the user clicked the recommendation. The value for your internal Salesforce org is the empty key, `"000000000000000000"`.
`{!orgId}`	The ID of the org in which the user clicked the recommendation.
`{!userId}`	The ID of the user that clicked the recommendation.

- `Audience`—Select an audience for the recommendation. If you don't select an audience, all members of the site see the recommendation.

  Tip: To create an audience that appears in this dropdown list, in Experience Workspaces, select **Content Management** > **Recommendations** > **Audiences**. Click **New**.

- `Enabled`—If checked, this recommendation is active and appears in sites.

  The Recommendations Carousel displays your custom recommendations and also displays system-generated topic recommendations for your site.

  After a site member clicks or dismisses a recommendation, it no longer appears for that member.

5. Click **Save**.
   So that users don't see the same recommendations all the time, Salesforce periodically removes and brings back custom recommendations that haven't been accepted or dismissed.

Tip: To remove a recommendation, click the recommendation name. At the bottom of the recommendation details, click **Delete**.

IN THIS SECTION:

Create Audiences for Your Recommendations

Create audiences of new members or use the API to manage customized lists of audience members for your custom recommendations.

SEE ALSO:

Update Your Experience Builder Site's Template

Create Audiences for Your Recommendations

Create audiences of new members or use the API to manage customized lists of audience members for your custom recommendations.

Note: Recommendation audiences and personalization audiences are different features. For a more updated content targeting experience, we suggest using CMS collections and personalization audiences.

1. In Experience Workspaces, select **Content Management** > **Recommendations** > **Audiences**.
2. Click **New**.
3. Complete the following fields.
   - `Name`—Enter a name for the audience.
   - `Audience Type`
     - Select **New Members** to create an audience based on how long users have been site members.

       Enter the number of days since registration for audience members.
     - Select **Custom List** to create an audience based on any criteria you want.

       Note: You can't manage audience membership for custom lists through the UI. Add and remove members through the API.
4. Click **Save**.

Audiences you create appear in the Audience drop-down list when you create a recommendation.

Tip: To remove an audience, click the audience name. At the bottom of the audience details, click **Delete**. If you remove an audience that is associated with a recommendation, the recommendation is disabled and the audience is set to the default (All site members).

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To access Experience Workspaces or Experience Management:
- Manage Experiences

  OR

  Create and Set Up Experiences

SEE ALSO:

Connect REST API Developer Guide: Custom Recommendation Audience Resources

Apex Reference Guide: Recommendations Class

Gamification

Use gamification tools, like Recognition Badges and Reputation, to keep your members engaged in your site.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

IN THIS SECTION:

Recognition Badges

Acknowledge your members' accomplishments or celebrate with them using Recognition Badges.

Reputation Overview

Your reputation in the Experience Cloud site directly corresponds to how active you are. The more you post, comment, and share, the higher your reputation level will be.

Recognition Badges

Acknowledge your members' accomplishments or celebrate with them using Recognition Badges.

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

Note: Badges can only be assigned to users and by users who have Chatter enabled.

We provided some default badges but you can create your own. You can also choose who else can create badges and who can give badges in your site.

IN THIS SECTION:

Recognition Badges Limitations

While Recognition Badges are a great way to keep your members involved in your site, keep a few things in mind when you use them.

Recognition Badges Setup

With just a few steps, you can set up Recognition Badges for your site and restrict who can create and give badges.

Missions

Game mechanics, such as using badges, are a great way to get your users involved in your Experience Cloud site. However, assigning badges manually can be time consuming. Instead, use the Missions feature to assign members badges automatically. Community managers have their say in what action earns a badge and when it can be awarded, and then Missions takes care of the rest. And members can see which badges they haven't yet earned, inspiring action.

Assign Recognition Badges to Experience Cloud Site Members

Assigning badges to members helps reward them for staying engaged in the Experience Cloud site.

Delete Assigned Badges

Sometimes badges are assigned to a member by mistake. If you gave the badge, you can delete it from the member's profile page.

Use the API to Give Recognition Badges Sample Code

You can use the API to programmatically give recognition badges to Experience Cloud site members.

SEE ALSO:

Experience Cloud Recognition Badges Implementation Guide

Recognition Badges Limitations

EDITIONS

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

While Recognition Badges are a great way to keep your members involved in your site, keep a few things in mind when you use them.

- Chatter must be enabled for your site.
- Site members with the following user licenses can see the badges that they have received, but not give badges:
  - Customer Portal User
  - High Volume Customer Portal
  - Internal Portal User
  - Standard Partner

- Badges aren't translated. The badge name and description are the same regardless of which language the member is using.
- "Review" moderation rules are not enforced for badges comments. To help prevent unwanted keywords from appearing in your site, add your list of words to "block" or "replace" rules.
- Past activity, such as comments or likes, isn't counted when you create a mission.

Recognition Badges Setup

With just a few steps, you can set up Recognition Badges for your site and restrict who can create and give badges.

EDITIONS

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

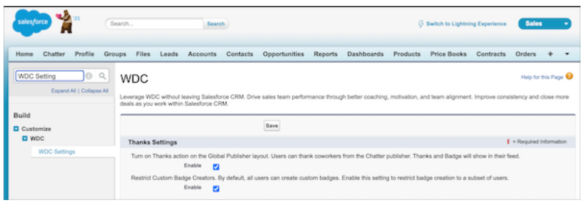
IN THIS SECTION:

Enable WDC Thanks

Recognition Badges are based on the WDC Thanks feature. Enable this feature plus the ability to restrict who can create badges before continuing in your setup.

Note: You don't need an extra WDC license to set up the Thanks feature.

1. In Classic, from Setup, enter `WDC Settings` in the **Quick Find** box.
2. Select **WDC Settings.**
3. Under **Thanks Setting**, select **Enable** and save. The Restrict Custom Badge Creators option is now available.
4. Under Restrict Custom Badge Creators, select **Enable**, and save.



EDITIONS

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

USER PERMISSIONS

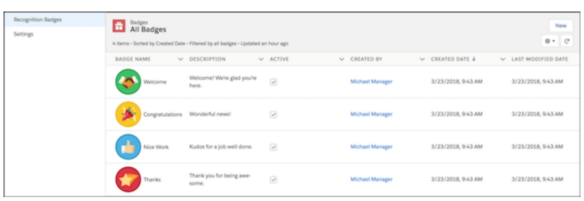
To set up the Thanks feature:
- Customize Application

Turn On Recognition Badges in Experience Workspaces

Turn on Recognition Badges via the Gamification Tile to finish setting up and start giving badges.

Before completing this task, enable WDC's Thanks feature, configure permission sets for who can create and give badges, and add recognition to user profile layouts.

1. In Experience Workspaces, click the Gamification tile.
2. In **Settings**, turn on Recognition Badges. A Recognition Badges section appears above **Settings**.
3. To see the available badges and create and manage badges, click **Recognition Badges**.



EDITIONS

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

USER PERMISSIONS

To turn on or off Recognition Badges:
- Create and Set Up Experiences

  AND

  Moderate Chatter

Configure Who Can Create Recognition Badges

EDITIONS

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

USER PERMISSIONS

To create permission sets:
- "Manage Profiles and Permission Sets"

To assign permission sets:
- "Assign Permission Sets"

Use permission sets, our recommended method, to choose which members can create recognition badges. Restricting who can do so helps control the number of badges in your site and maintains the value of a badge.

Say that you create a recognition badge to be given to MVPs. Restricting who can create badges helps eliminate the risk of having multiple MVP badges. Restricting who can give the badge to, say, community managers helps make sure only those members who are truly MVPs receive recognition for it.

1. First, set up the permission set for creating badges. From Setup, enter `Permission Sets` in the Quick Find box, then select **Permission Sets**.
2. Click **New**.
3. Enter your permission set information. Name the permission set "Create Custom Badge Definitions."
4. Click **System Permissions** and then click **Edit**.
5. To add the permissions for creating a badge, select **Create custom Badge Definitions** permission.
6. Select **Manage Assignments** and add those users you want to let create badges.

Configure Who Can Assign Recognition Badges

EDITIONS

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

USER PERMISSIONS

To create permission sets:
- "Manage Profiles and Permission Sets"

To assign permission sets:
- "Assign Permission Sets"

Use permission sets, our recommended method, to choose which members can assign recognition badges. Restricting who can do so helps control the number of badges in your site and maintains the value of a badge.

> Note: Buttons for assigning badges appear in two places on the member's profile. If after following the steps below, your approved users don't see the Give button at the top of a member's profile, under Settings, go to Users. Edit the User Page Layout and add the Give Badge action in the Salesforce Mobile and Lightning Experience Actions section.

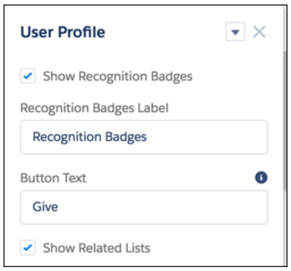
1. First, set up the permission set for assigning badges. From Setup, enter `Permission Sets` in the Quick Find box, then select **Permission Sets**.
2. Click **New**.
3. Enter your permission set information. Name the permission set "Assign Recognition Badges in Experience Builder Sites."
4. Click **System Permissions** and then click **Edit**.
5. To add the permissions for assigning a badge, select **Assign Recognition Badges in Experience Builder Sites** permission.
6. Select **Manage Assignments** and add those users you want to let assign badges.

Use Components to Display Assigned Recognition Badges on Member Profiles

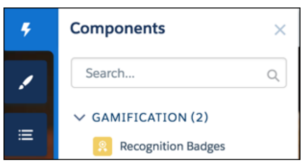
Use the User Profile component or the Recognition Badge component to display assigned Recognition Badges on a member's profile.

You can either use the User Profile component or the Recognition Badges component to allow assigned badges to display on a member's profile page.

1. In the User Profile component, select **Show Recognition Badges**.



2. Alternatively, drag the Recognition Badges component onto the profile page.



EDITIONS

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

USER PERMISSIONS

To manage page components:

- Create And Set Up Experiences

Create, Edit, and Delete Recognition Badges

In addition to the four default badges, you can create your own to fit the needs of your site. You can edit both the default badges and your custom badges.

1. To create a badge, in Experience Workspaces, click the Gamification tile and go to the Recognition Badges section.
2. Click **New**.
3. Give your badge a name and a description and upload an image. Click **Save**. The **Public** and **Active** checkboxes are selected by default. When you save, your badge is immediately available to everyone with permissions to give a badge. If you want to limit who can give a badge, deselect **Public**. If you aren't ready for it to be live, deselect **Active**. If you want the badge to be available for a mission, select **Mission Badge**.

EDITIONS

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

USER PERMISSIONS

To create recognition badges:

- Create Custom Badge Definitions

To manage your recognition badges:

- Create And Set Up Experiences

  AND

  Moderate Chatter

  OR

  Manage Experiences

  AND

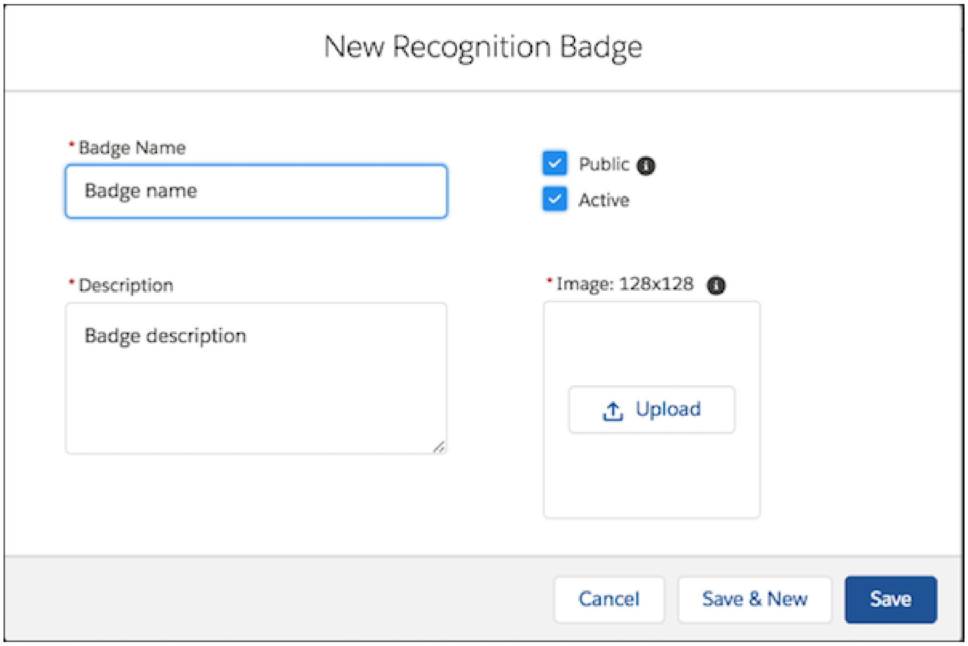
  Moderate Chatter

To manage badges owned by someone else:

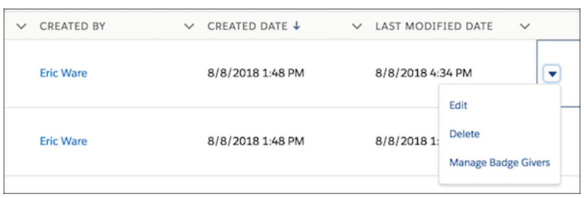
- Modify All Data

  AND

  Moderate Chatter



4. To edit the fields, go to the badge related list, click the dropdown at the end of the badge's row, and click **Edit**.



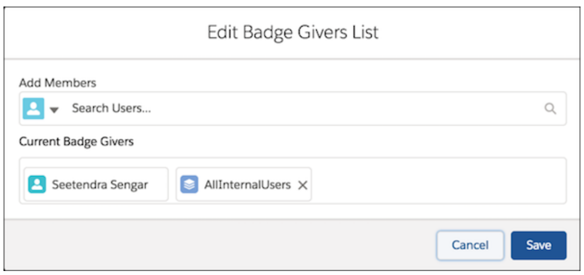
5. To delete a badge, go to the badge related list, click the dropdown at the end of the badge's row, and click **Delete**.

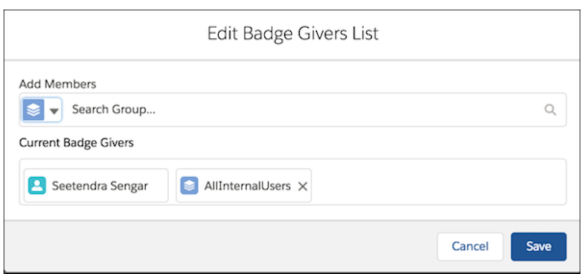
Manage Who Can Assign a Specific Recognition Badge

Controlling who can assign a recognition badge helps make sure the right badges are awarded to the right members. For example, you can set it up so that only community managers can assign MVP and VIP badges.

By default, recognition badges are available to everyone with permission to assign badges. To be able to select specific givers, make sure to deselect **Public** when you create or edit the badge.

1. In Experience Workspaces, click the Gamification tile.
2. Click the dropdown and the end of the badge's row, and click **Manage Badge Givers**.
3. In the window, search to add the users or public groups you want to have permission to assign badges.





Note: Only those users with the Assign Recognition Badges in Experience Builder Sites permission are available. You can remove members from the list by clicking the X by their name.

4. Click **Save**.

EDITIONS

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

USER PERMISSIONS

To create recognition badges:

- Create Custom Badge Definitions

To manage your recognition badges:

- Create And Set Up Experiences

  AND

  Moderate Chatter

  OR

  Manage Experiences

  AND

  Moderate Chatter

To manage badges created by someone else:

- Modify All Data

  AND

  Moderate Chatter

Display the Full List of Assigned Recognition Badges on a Member's Profile Page

EDITIONS

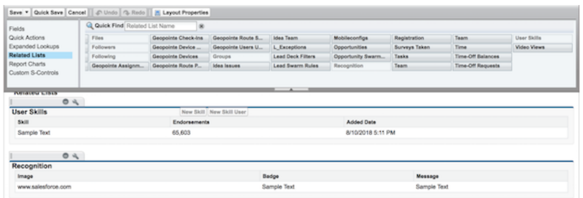
Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

USER PERMISSIONS

To update the user profile layout:
- Customize Application

Edit the user profile layout to display the full list of assigned recognition badges on a members' profile page.

1. From Setup, go to **Users** under **Customize**. Select **Page Layouts**.
2. Click **Edit** next to User Profile Layout.
3. Click **Related Lists** and drag **Recognition** to the Related Lists section of the page layout.



4. Click **Save**.
5. Each site's guest users have a discrete user profile. To find out which user profile layout to update, go to Experience Builder in the site you're working on.
6. Click **Settings** and select the link to the guest user profile.
7. Repeat steps 1–4 for that user profile layout.

Missions

EDITIONS

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

Game mechanics, such as using badges, are a great way to get your users involved in your Experience Cloud site. However, assigning badges manually can be time consuming. Instead, use the Missions feature to assign members badges automatically. Community managers have their say in what action earns a badge and when it can be awarded, and then Missions takes care of the rest. And members can see which badges they haven't yet earned, inspiring action.

Community managers create missions and choose the badge, the action, and the threshold. For example, a mission could assign the Nice Work badge when a member answers 10 questions. Actions you can choose from include writing a post or comment, receiving a like, and more. Members can earn each mission badge once.

Note: Badges can only be assigned to users and by users who have Chatter enabled.

IN THIS SECTION:

Create a Mission

Create a mission, choosing an action, threshold, and badge, to automatically give badges to your members.

Display Unearned Mission Badges

Inspire members to participate more in your Experience Cloud site by showing them the badges they can earn. You can display the unearned badges in the member's recognition badges list.

Create a Mission

Create a mission, choosing an action, threshold, and badge, to automatically give badges to your members.

EDITIONS

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

USER PERMISSIONS

To create recognition badges:
- Create Custom Badge Definitions

To manage your recognition badges:
- Create And Set Up Experiences

  AND

  Moderate Chatter

  OR

  Manage Experiences

  AND

  Moderate Chatter

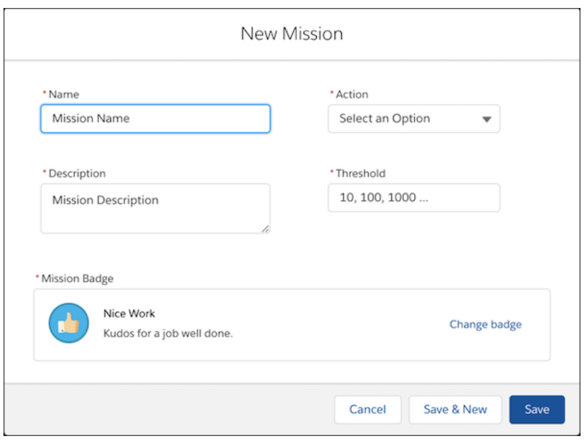
To manage badges created by someone else:
- Modify All Data

  AND

  Moderate Chatter

Note:
- To use Missions, set up Recognition Badges.
- Members only receive a mission badge once. If a member received the badge before a mission was set up, they won't receive it again.
- Missions count activities that occurred before the missions were set up. When you set up missions for the first time, click **Reset Activity Count** to restart the count for all activities. Be careful about resetting the counts after you have missions established, though, as the reset will erase all of your members' progress toward earning badges.

1. In Experience Workspaces, click the Gamification tile and go to the Missions section.
2. Click **New**.
3. Give the mission a name and a description.



4. Select the action that the member performs.
5. Enter the threshold, which sets the total number of actions a member must repeat to earn the badge. The threshold doesn't repeat and badges are earned once. For example, if you set the threshold to 10, the member will receive the badge after completing the 10th action, but not the 20th.
6. Choose your preferred badge and save your changes.

Tip: To make a badge available for missions, in the Recognition Badges section, create or edit a badge and select **Mission Badge**.

As a best practice, use the badge's name and description to explain how the user can earn it.

Display Unearned Mission Badges

Inspire members to participate more in your Experience Cloud site by showing them the badges they can earn. You can display the unearned badges in the member's recognition badges list.

User Permissions Needed	
To edit page components:	Create and Set Up Experiences AND View Setup and Configuration

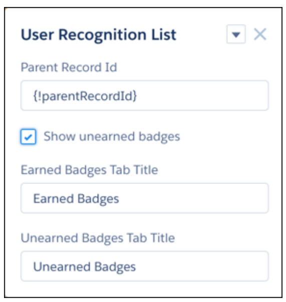
EDITIONS

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

Note:

- To use Missions, set up Recognition Badges.
- Missions count activities that occurred before the missions were set up. You can reset the count when you create your mission, but be aware that this resets all the activity counters.

1. In Experience Builder, open the Badge Received Related List page.
2. Click the User Recognition List component.
3. Select **Show unearned badges**.



Assign Recognition Badges to Experience Cloud Site Members

Assigning badges to members helps reward them for staying engaged in the Experience Cloud site.

1. Open the member's profile page.
2. Click either the **Give Badge** button at the top of the profile or the **Give** button on the Recognition Badges card.
3. Choose which badge you want to assign by clicking **Change badge**.
4. Add a message letting the member know why they're getting the badge, and click **Give**.

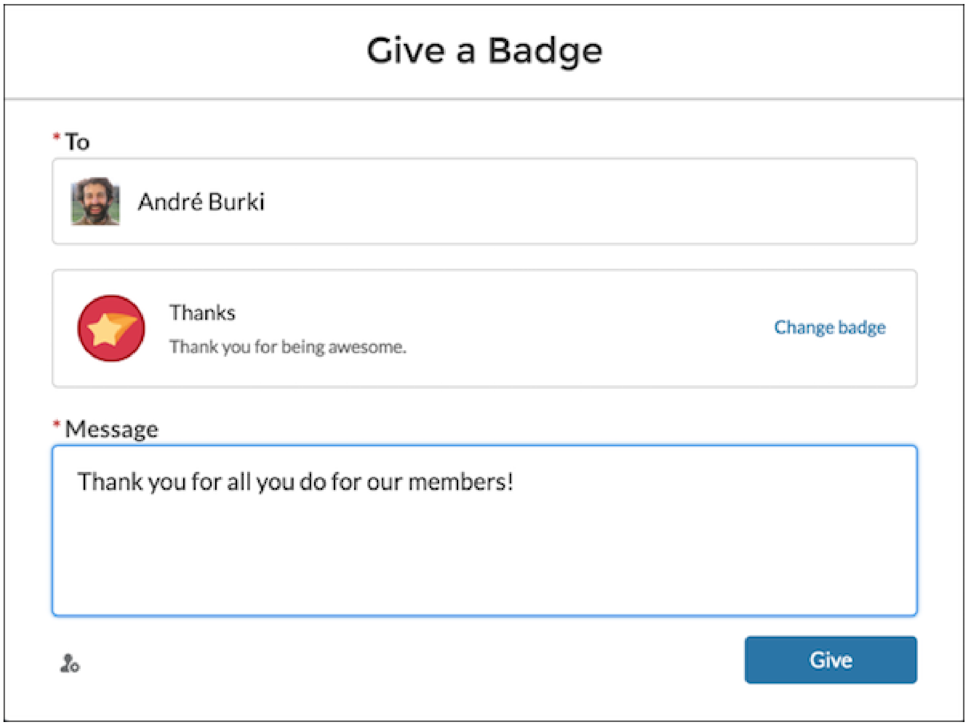
EDITIONS

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

USER PERMISSIONS

To assign recognition badges:

- Assign Recognition Badges in Experience Builder Sites



Delete Assigned Badges

EDITIONS

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

USER PERMISSIONS

To manage your recognition badges:

- Create And Set Up Experiences

  AND

  Moderate Chatter

  OR

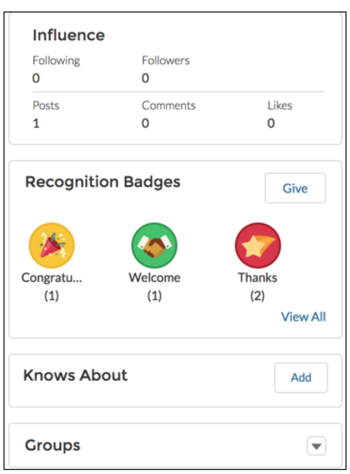
  Manage Experiences

  AND

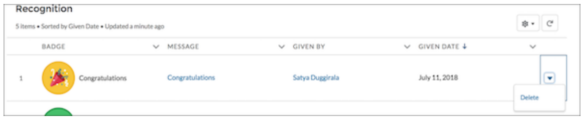
  Moderate Chatter

Sometimes badges are assigned to a member by mistake. If you gave the badge, you can delete it from the member's profile page.

1. Open the profile page for the member who got the badge by mistake.
2. To open the Recognition Badge list view, click **View All** under Recognition.



3. Locate the badge in the list and click the dropdown at the end of the row.
4. Click **Delete**.



Use the API to Give Recognition Badges Sample Code

You can use the API to programmatically give recognition badges to Experience Cloud site members.

Assign a Recognition Badge and Notify a Member Using Apex

```
ID networkID = '0DBB0000000CdBaOAK';
ID badgeDefintionID = '0W1B0000000ekuJKAQ';
ID giverID = '005B0000003InDeIAK';
ID recipientID = '005B000000483dDIAQ';
String message = 'Welcome to the site';

WorkThanks thanks = new WorkThanks (
NetworkdID=networkID
GiverID=giverID,
Message=message
);
insert thanks;

WorkBadge badge = new WorkBadge(
DefinitionId=badgeDefinitionId,
NetworkID=networkID
RecipientId=recipientID,
SourceId=thanks.id
);
insert badge;

// optional: create a Chatter post on the user profile
// showing the badge. The user will be notified through
// the standard Chatter notification mechanisms.
FeedItem feedItem = new FeedItem(
NetworkScope=networkID,
ParentId=recipientID,
RelatedRecordId=thanks.id,
Body=message,
Type='RypplePost',
Visibility='AllUsers'
);
insert feedItem;

// Unfortunately, there is a limitation in the WDC API that
// prevents these 2 lines from working:
// thanks.FeedItemID = :feedItem.id;
// update thanks;
```

Assign a Recognition Badge When a Member Reaches a Number of Reputation Points

To avoid assigning the same badge twice, we've added a custom "hasBadge_c" field on the user object.

```
trigger NetworkMemberTrigger on NetworkMember (after update) {
              for (NetworkMember nm : Trigger.New) {
                   User user = [select ID, hasBadge_c from User where ID =
:nm. MemberID];
         If (nm.ReputationPonts >= 40 && !user.hasBadge_c) {
             WorkThanks thanks = new WorkThanks(
             GiverId='005B00000036ukY',
             Message='inserted by trigger',
             NetworkId=nm.NetworkId);
             insert thanks;

            WorkBadge badge = new WorkBadge(
            DefinitionId='0W1B0000000T1QBKA0',
            NetworkId=nm.NetworkId,
            RecipientId=nm.MemberId,
            SourceId=thanks.id);
            insert badge;

            user.hasBadge_c = true;
            update user;
      }
   }
}
```

Automatically Add Reputation Points When Badge Is Assigned to a Member

To avoid hardcoding the number of reputation points that are assigned with the badge, this example assumes that the WorkBadgeDefinition entity has been customized with an additional "ReputationPoints__c" field.

```
trigger WorkBadgeTrigger on WorkBadge (after insert) {
             for (WorkBadge badge : Trigger.new) {
                 if (badge.DefinitionId == '0W1B0000000T1QBKA0') {
                     WorkBadgeDefinition badgeDefinition = [select Id,
ReputationPoints_c from WorkBadgeDefinition where Id =
:badge.DefinitionId];
            NetworkMember member = [select Id, ReputationPoints from
NetworkMember where MemberID = :badge.RecipientId];
            member.ReputationPoints = member.ReputationPoints +
badgeDefinition.ReputationPoints_c;
            update member;
      }
   }
}
```

Assign Recognition Badge When Member Creates Number of Posts or Comments

The ChatterActivity object contains the following useful fields:

- CommentCount
- CommentRecievedCount

- LikeReceivedCount
- PostCount

These counters can be used to programmatically assign badges based on various thresholds. For example, members could get a badge whenever they create 100 posts or whenever they received 100 likes.

```
trigger ChatterActivityTrigger on ChatterActivity (after update) {
              for (ChatterActivity ca : Trigger.New) {
                  if (ca.PostCount >= 10) {
                      // TODO: assign badge to user if he hasn't received one already
      }
   }
}
```

Reputation Overview

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Your reputation in the Experience Cloud site 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 members so that they know how influential you are. When you start out, you are at the lowest level. As you become more active, you gain points and your reputation level increases. Increases in reputation levels are posted to your feed. In other words, as people see you participating and sharing your knowledge, your credibility and influence grows.

These are the default actions that increase your reputation level.

- Posting
- Commenting
- Liking a post or comment
- Sharing a post
- People sharing your posts
- People commenting on your posts
- People liking your posts or comments
- Mentioning someone
- Being mentioned
- Asking a question
- Answering a question
- Receiving an answer
- Marking an answer as best
- People marking your answer as best
- Endorsing someone for knowledge on a topic
- Being endorsed for knowledge on a topic

Your administrator defines the activities that help you gain points. They also set the number of points for each action.

IN THIS SECTION:

Enable Reputation in Your Experience Cloud Site

Enable reputation so that site members are recognized and rewarded for participating.

Set Up Reputation Levels

Update the default reputation levels to meet your Experience Cloud site's needs and help motivate your members.

Set Up Reputation Points

Set up a point system to reward users for participating in the Experience Cloud site.

How is my Experience Cloud site reputation calculated?

The reputation level on your profile is calculated based on your total points.

Enable Reputation in Your Experience Cloud Site

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To edit settings:

- Create and Set Up Experiences

  AND

  Is a member of the Experience Cloud site

Enable reputation so that site members are recognized and rewarded for participating.

A powerful tool for a community manager is the ability to recognize individual members for their participation. Community managers know that recognition and a little friendly competition usually lead to more active members. Enabling reputation turns on a default point system and set of reputation levels in the Experience Cloud site. A community manager can personalize labels and point values.

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, see their reputation level on their profile and when hovering over their name. Total points also show on member's profiles.

Note: When you enable Reputation, Chatter influence is removed from the Contribution section on the profile page.

1. Open Experience Workspaces.
2. Click **Administration** > **Preferences**.
3. Select **Enable setup and display of reputation levels**, then click **Save**.

After you enable reputation, a default point system and set of reputation levels is available. The default reputation points are as follows:

Action	Points
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.

Action	Points
Receive a mention	5
Questions and Answers	
Ask a question	1
Answer a question	5
Receive an answer	5
Mark an answer as best	5
Your answer is marked as best	20
Knowledge	
Endorsing someone for knowledge on a topic	5
Being endorsed for knowledge on a topic	20

If your selected Experience Cloud site doesn't have Chatter enabled, the Reputation section doesn't appear. To show the Reputation section, go to **Administration** > **Preferences** and select **Show all settings in Workspaces**.

SEE ALSO:

Set Up Reputation Levels

Set Up Reputation Points

How is my Experience Cloud site reputation calculated?

Set Up Reputation Levels

Update the default reputation levels to meet your Experience Cloud site's needs and help motivate your members.

When reputation is enabled, 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: An Experience Cloud site must have at least three reputation levels and can have up to 50.

1. Open Experience Workspaces.
2. Click **Administration** > **Reputation Levels**.

   From here you can:

   - Upload your own image for each reputation level. To upload a new image, click the default image and browse to an image file.

     Note: You can't revert to the default reputation level images from the Salesforce user interface. Instead, use Connect REST API.

   - 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.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To update reputation levels:
- Manage Experiences

  AND

  Is a member of the Experience Cloud site

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**.

You can now update the point system for the site. The point system determines how many points a user gets when they perform certain actions or when others recognize their contributions through comments, likes, and shares. Reputation level increases are posted to member feeds.

You can translate reputation level names so that international members can view their reputation levels in the appropriate language. In Translation Workbench, select the `Reputation Level` setup component and then expand the node next to your site.

SEE ALSO:

Set Up Reputation Points

Set Up Reputation Points

Set up a point system to reward users for participating in the Experience Cloud site.

When reputation is enabled, there is a default point system setup. 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 gets no points.

The table shows the default events and points.

Action	Points
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	

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To update reputation points:
- Manage Experiences

  AND

  Is a member of the Experience Cloud site

Action	Points
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

Questions and answers in the feed are not to be confused with the Chatter Answers functionality.

Note: In orgs with reputation enabled before the Winter '15 release, actions associated with questions and answers are available at the time of the release. Their default point values are set to 0. The release doesn't affect existing user reputation points, and users don't accrue points from these actions until you configure point values for them.

1. Open Experience Workspaces.
2. Click **Administration** > **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 Experience Cloud site.

Tip: You can directly update reputation points for a member via the Salesforce API. You can also use Apex triggers to send custom notifications based on changes to reputation points.

SEE ALSO:

Set Up Reputation Levels

How is my Experience Cloud site reputation calculated?

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

The reputation level on your profile is calculated based on your total points.

Points are accrued when you perform activities that your community manager has assigned point values. You could also potentially gain points if your posts or comments draw reaction from other members. For example, your community manager may have decided that writing a post earns you 5 points. If someone else shares your post, your community manager may decide that you should earn 10 points because your post is influencing others to contribute.

Note: Only active users accrue points. For example, if an active user likes the post of an inactive user, the active user gets 1 point, but the inactive user gets no points.

Default point values are as follows. Keep in mind that your community manager may have customized these values. For more information, contact your community manager.

Action	Points
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
Being endorsed for knowledge on a topic	20

SEE ALSO:

Enable Reputation in Your Experience Cloud Site

Reporting for Experience Cloud Sites

Use reporting to see short-term and long-term trends in various areas of your Experience Cloud site. The preconfigured AppExchange package makes reporting a snap for community managers. You can also give the power of reporting to your members.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

IN THIS SECTION:

Report on Experience Cloud Sites with AppExchange Packages

The Salesforce Communities Management packages give community managers an essential starter set of dashboards and reports to keep tabs on activity and engagement directly in Experience Workspaces.

Service Community Scorecard

Track member use, service metrics, and search activity using the Service Community Scorecard.

Login History Report Codes

The Login History Report includes a Login Status Column that displays codes. Each code identifies a unique event that happens during login. The following list describes what each code means.

Set Up Report Management for External Users—Create and Edit Reports

Partner and customer users can create, delete, and edit reports in their own personal folder or, with sufficient permission, in a privately shared folder. You can grant partner and customer users permissions to create and edit reports through their profiles or permission sets. After you grant the required permissions, partners and customers can use the drag-and-drop Report Builder tool.

Track Experience Cloud Site Activity with Custom Reports

Create custom reports to track usage, moderation, and other activity.

Experience Cloud Sites Report and Dashboard Considerations

If the Reports and Dashboards tabs are exposed in the Experience Cloud site, external users can access reports and dashboards.

Allow External Users to Access and Report on Tasks and Events

Take the following steps to give access to your portal and Experience Cloud site users to report on tasks and events.

Google Analytics™ for Salesforce Communities Package

The Google Analytics for Salesforce Communities package contains pre-configured reports that track search activity within an Experience Cloud site.

Report on Experience Cloud Sites with AppExchange Packages

The Salesforce Communities Management packages give community managers an essential starter set of dashboards and reports to keep tabs on activity and engagement directly in Experience Workspaces.

Use the Salesforce Communities Management package to:

- Take advantage of the newest features using preconfigured reports (use the latest package version)
- View the latest metrics and rapidly spot trends
- Determine how fast your Experience Cloud site is growing
- Find out who your most engaged members are
- Discover which discussions people and groups are most excited about
- Identify areas that need attention
- Take immediate action on recent activity with Insights reports

Note: To use the preconfigured Insights reports, yourExperience Cloud site must use Chatter.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To install AppExchange packages:

- Download AppExchange Packages

During installation, dashboard and report folders are automatically installed in your internal org. You'll also have the option to give your community managers access to the package contents so you don't have to share the dashboard and report folders with them later. If you have no previous Insights or dashboards mapped in Experience Workspaces, they are automatically mapped for you during installation.

After the package is installed, you can access your new dashboards and reports alongside all your other Salesforce dashboards and reports. When you view the dashboards in Experience Workspaces, site-specific data is displayed.

IN THIS SECTION:

What's New?

For Spring '21, we added a dashboard and four reports related to question post response time. They let you know how long it takes for a question post to be answered and how long it takes for the post to have an answer marked as best. These metrics are helpful for determining when to increase service levels. The dashboard and reports are only available in the package with Chatter.

Install the Package

Any internal user with the necessary permissions can install the Salesforce Communities Management package, as long as Salesforce Communities is enabled in your Salesforce org.

Upgrade Considerations

The cleanest way to upgrade the package is to completely uninstall the existing one. However, this can get complicated and may cause you to lose your customizations. We recommend reinstalling only if you want to start clean and make sure you have only the latest and greatest versions of our reports. If you haven't upgraded for a few releases, the clean slate may be the best approach.

Install the Upgrade

If you have a previously installed version of the package, you can upgrade when a newer package becomes available.

Post-Upgrade Checklist

Upgrading can sometimes be tricky. We give you lots of amazing components each release, but we don't have the power to automatically remove components when we create a better version. Make sure you review the Unsupported Components list. If you haven't made any customizations to our reports and dashboards, we recommend that you delete all the unsupported components.

Insights Vs. Dashboards—What's the Difference

Use Insight reports to view, monitor, and act on your community's activity. These reports give you a super-focused look at a specific area while helping you with day-to-day community management. Insights can help you prioritize your work and give you instant access to what matters most.

Service Community Scorecard

Some of the most common feedback we get is that community managers need a single dashboard providing information about the success of a community. In Summer '17, we announced the Service Community Scorecard. It gives community managers for self-service and support communities the information they need all in one place. If your community is not a service community, use it as inspiration or a starting point to create your own scorecard.

Experience Management Insights

The Salesforce Communities Management package provides a set of reports that let you monitor recent activity and drill down to the source to take further action.

Community Management Dashboards Descriptions

The Salesforce Communities Management package provides a set of dashboards, each with its own source reports, and a set of custom report types. The available reports depend on whether you install the package for communities that have Chatter, or the package for communities that don't.

Salesforce Org Dashboard and Report Descriptions

You must view the Chatter and Licenses dashboards and reports from your internal Salesforce org.

Custom Report Type Descriptions

The reports in this package are based on a set of communities-focused custom report types, which you can customize to enhance reporting capabilities with more fields.

The Power of Customization

The dashboard and reports provided in the package are a great start, but they may not be exactly what your community needs. With a few simple steps, you can customize the provided dashboards and reports to suit your needs. To customize a report, open the **Reports** tab and click the report name you want to modify, then click **Customize**.

Community Case Deflection Metrics Dashboard and Reports

Install the Salesforce Case Deflection Reporting Package to see how well the Contact Support Form and Case Deflection components actually deflect cases from being created. Using the Community Case Deflection Metrics dashboard, get real-time metrics on potential and confirmed case deflections, the most helpful articles and discussions, and the least helpful articles and discussions.

Unsupported Components

The following list identifies which reports are not supported in this release. If you are installing the package for the first time or are installing the package from scratch, you don't need to worry about these as they will not show up. If you are updating, be sure to remove these components.

SEE ALSO:

Enable and Map Engagement Insights

Enable and Map Dashboards

What's the difference between Engagement Insights and dashboards?

What's New?

For Spring '21, we added a dashboard and four reports related to question post response time. They let you know how long it takes for a question post to be answered and how long it takes for the post to have an answer marked as best. These metrics are helpful for determining when to increase service levels. The dashboard and reports are only available in the package with Chatter.

Tip: The ✦ symbol identifies all the new components in this release.

EDITIONS

Available in: Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Report Abbreviations

Notice one or two letters or symbols at the front of some report names? They're a bit of shorthand to help keep the report names at a reasonable length. Here's a quick rundown of what they mean.

- # - Number of Records
- A - Activity
- C - Content
- CH - Chatter
- CH D - Chatter Activity by Department
- G - Groups
- L - Logins
- L - CC - Logins for Customer Community License
- L - CP - Logins for Customer Community Plus License
- L - PC - Logins for Partner Community License
- M - Members
- MO - Moderation
- O - Overview
- Q - Questions
- R - Recommendations
- S - Self-Service Community
- T - Topics

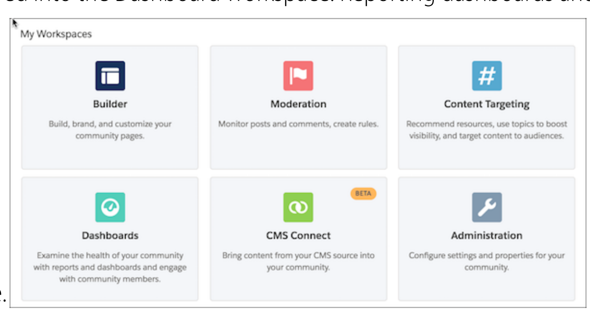
Enable Experience Workspaces

Experience Workspaces is our fantastic new community management interface, and the replacement for the old Community Management Console. Eventually all the orgs will move to Experience Workspaces. Now is a great time to explore all the new management tools not found on the Community Management Console. To enable Experience Workspaces, in Setup, enter **Communities** in the Quick Find box and click **Communities Settings**. Under Community Management Settings, select **Enable Experience Workspaces**. Experience Workspaces are enabled by default in all orgs created after Spring '17.

Note: Internet Explorer® version 11 doesn't support Experience Workspaces.

What's Different Between Experience Workspaces and Community Management?

Experience Workspaces offers a streamlined area to access all the tools that you need for building, managing, and tracking your community. Even though it looks different, everything you use is still there. Some things have been moved around a bit.

- Engagement reports have been moved into the Dashboard workspace. Reporting dashboards and your Home dashboards are also located in the Dashboard workspace. 

- Moderation pages have been organized into separate areas within the Moderation workspace. You can access moderation Insights from the Home tab and create and customize moderation rules, member criteria, and content criteria from the Rules tab.
- Want to jump to another workspace from the workspace you are in? It's easy! Click the icon in the upper-left corner and a navigation dropdown menu appears. You can also switch between communities without leaving Experience Workspaces.

Note: We encourage you to switch to Experience Workspaces, as no further enhancements are coming to the Community Management Console.

IN THIS SECTION:

Salesforce Community Management Package with Chatter

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

The Experience Management package delivers the insights, dashboards, reports, and moderation controls community managers need, to drive adoption, monitor engagement, and build a vibrant community.

In this addition to version 14.0, we added four reports and a dashboard:

- Question Response Time Dashboard
- Average Time to First Answer
- Average Time to Best Answer
- Avg Time to First Answer for Topics List
- Avg Time to Best Answer for Topics List

Unsupported old reports and dashboards—if you're upgrading, remove these components manually.

Salesforce Community Management Package Without Chatter

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

The Experience Management package delivers the dashboards and reports community managers use, to drive adoption, monitor engagement, and build a vibrant community.

The most recent version is 9.0.

Unsupported Components—if you're upgrading, remove these components manually

Install the Package

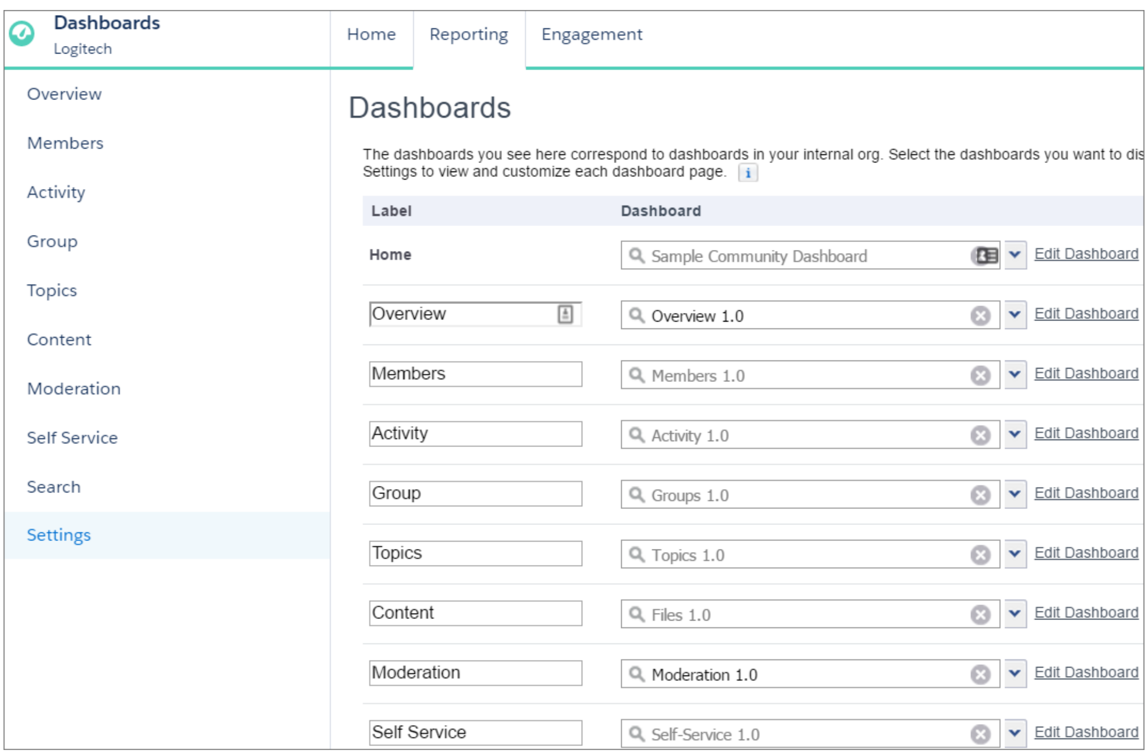
Any internal user with the necessary permissions can install the Salesforce Communities Management package, as long as Salesforce Communities is enabled in your Salesforce org.

If you're upgrading from a previous version of this package, review the Upgrade Considerations and then follow the steps in Install the Upgrade. Be sure to check the unsupported components list and delete them from your organization.

> **Note:** To install the version of the package for Communities with Chatter, Chatter must be enabled. There are no prerequisites to install the version of the package for communities without Chatter.

1. Select **AppExchange** from the Lightning Platform Apps drop-down list. You can also click here.
2. Search the AppExchange site for Salesforce Communities Management (for Communities with Chatter) or Salesforce Communities Management (for Communities without Chatter).
3. Click **Get It Now** on the application information page. If prompted, log in to the AppExchange.
4. Click **Install in Production**.
5. Review the terms and conditions, select **I have read and agreed to the terms and conditions**, then click **Confirm and Install**.
6. To grant access to the users working with the reports and dashboards, click **Install for Specific Profiles**.
7. Review the list of API access that the package components have been granted access to, then click **Next**.
8. Click **Install**.

> **Example:** Report folder mapping in the Dashboard workspace of Experience Workspaces.



EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To install packages:
- Download AppExchange Packages

If it's your first time installing the package, or you don't have any current mappings for your Community Management or Experience Workspaces, the package automatically maps the Insights report folders and dashboards for you.

Note: If you have an earlier version of the package installed, consider uninstalling it before reinstalling the new version. However, if you've customized any of your reports, you can upgrade the package without uninstalling your current version. Click here for more information about what to consider when upgrading.

The Installed Package Detail page confirms when installation is complete. In your Salesforce org, look in the Reports tab for the following folders.

Folder Name	Description	Package with Chatter	Package without Chatter
Communities Dashboards	Provides the License Usage 1.0 dashboard.	✓	✓
Lightning Communities Dashboards	Includes dashboards that map to **Dashboards** in Community Management and Experience Workspaces, including your home page. Note: Installing the package doesn't auto-map a dashboard for your home page, you must map one yourself.	✓	
Communities Reports	Provides the reports used in your Community Management dashboards. If you're using Experience Workspaces, these reports are used in the dashboards in **Dashboards** > **Reporting**.	✓	✓
Community Management Home Reports	Provides the reports used in your Community Management home dashboard.	✓	✓
Insights Adoption 2.0 Insights Activity 2.0 Insights Files 2.0 Insights Groups 2.0 Insights Self-Service 2.0 Insights Topics 2.0 Members Engagement	Each folder includes reports for the mapped **Insights** pages in **Community Management** > **Engagement** or, if you're using Experience Workspaces, in **Dashboards** > **Engagement**.	✓	
Moderation Audit Trail Moderation Flagged Moderation Pending Moderation Users	Each folder includes reports for the mapped **Insights** pages in **Community Management** > **Moderation** or, if you're using Experience Workspaces, in **Moderation** > **Moderate** .	✓	
Flagged Files	Provides the Flagged Files Report.	✓	

Folder Name	Description	Package with Chatter	Package without Chatter
Flagged Messages	Provides the Flagged Direct Message Report and Flagged Private Message Report.	✓	
Misc Communities Reports	Provides reports that are feature-dependent, such as reports that require Chatter messages, direct messages, or the community case feed.	✓	
Chatter Dashboards	Provides reports and dashboards to track Chatter usage in your internal Salesforce org. Note: These folders don't map to anything in Community Management or Experience Workspaces	✓	
Chatter Reports		✓	

Note: If you are installing the package for Communities without Chatter, you also still have a Experience Management Home Dashboards folder.

Upgrade Considerations

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

The cleanest way to upgrade the package is to completely uninstall the existing one. However, this can get complicated and may cause you to lose your customizations. We recommend reinstalling only if you want to start clean and make sure you have only the latest and greatest versions of our reports. If you haven't upgraded for a few releases, the clean slate may be the best approach.

If you choose to just go ahead and upgrade, don't worry--during the upgrade, your customizations are preserved. We don't overwrite anything you've tweaked. However, we can't port over your customizations to any new versions of reports or dashboards that we happen to be installing. That's ok. The old, customized versions will keep working just fine.

But, if we update existing reports or dashboards, we do recommend that you recreate any customizations you've made and then delete the older component versions

Note: Versioning is handled at the component level: dashboards, reports, and custom report types. If a component is updated, its version is updated. For a list of new components, see What's New?. Because of the way we map Insights reports in Experience Management, we also version the Insights folders. If we make major changes to Engagement or Moderation, we provide an updated version of each Insights folder within that page.

Install the Upgrade

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To install packages:
- Download AppExchange Packages

If you have a previously installed version of the package, you can upgrade when a newer package becomes available.

Upgrading doesn't overwrite the original custom report types, dashboards, or reports.

Important: Customizations are not ported to the new package. If we updated components that you've customized, you must recreate your customizations in the new component versions. Recreate your customizations before continuing to the next step.

1. Review the upgrade considerations.
2. Install the Package. Installing an upgrade is just like a clean install. After you install the package, click **Reports** in your internal Salesforce org to check out your new folders and components. Dashboard and report names are suffixed with version numbers so you can easily identify the new items.
3. Review What's New? to see if we updated any components that you've customized. You can also look for this symbol in the document to identify new components.
4. In Experience Management or the Dashboard workspace, review and update your dashboard and Insights mappings. Click **Dashboards** > **Settings or Engagement** > **Settings**.

   We recommend that you verify your dashboard mappings are using the latest version of all the dashboards.
5. If applicable, delete any reports, dashboards, or custom report types that were updated or are now unsupported to avoid confusion and ensure your community managers always use the latest and greatest.

   For more information, see What's New? and Unsupported Components.

Post-Upgrade Checklist

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Upgrading can sometimes be tricky. We give you lots of amazing components each release, but we don't have the power to automatically remove components when we create a better version. Make sure you review the Unsupported Components list. If you haven't made any customizations to our reports and dashboards, we recommend that you delete all the unsupported components.

If you're upgrading to the Communities Management (for Communities with Chatter) package, complete these steps:

- ☐ Delete all the reports in the original Insights folders and also delete those original folders. Then in Community Management, update your mapping to use the Insights 2.0 folders. For example, you can delete the **Insights Adoption** folder and all of its contents, but keep the **Insights Adoption 2.0** folder. Keep in mind that if you made any customizations to the Insights reports, they don't port over to the updated versions, and you'll lose those customizations if you delete those reports.
- ☐ Make sure the License Usage 1.0 dashboard is **not** mapped in Community Management. View this dashboard only in your internal Salesforce org, not in Community Management.
- ☐ If you still see version numbers on your Communities Dashboards and Communities Reports folders, remove them from the folder names and merge all the reports into one folder. Your reports and dashboards aren't affected by renaming the folders. Review the list of report and dashboard folders that should be included in your org.

Insights Vs. Dashboards—What's the Difference

Use Insight reports to view, monitor, and act on your community's activity. These reports give you a super-focused look at a specific area while helping you with day-to-day community management. Insights can help you prioritize your work and give you instant access to what matters most.

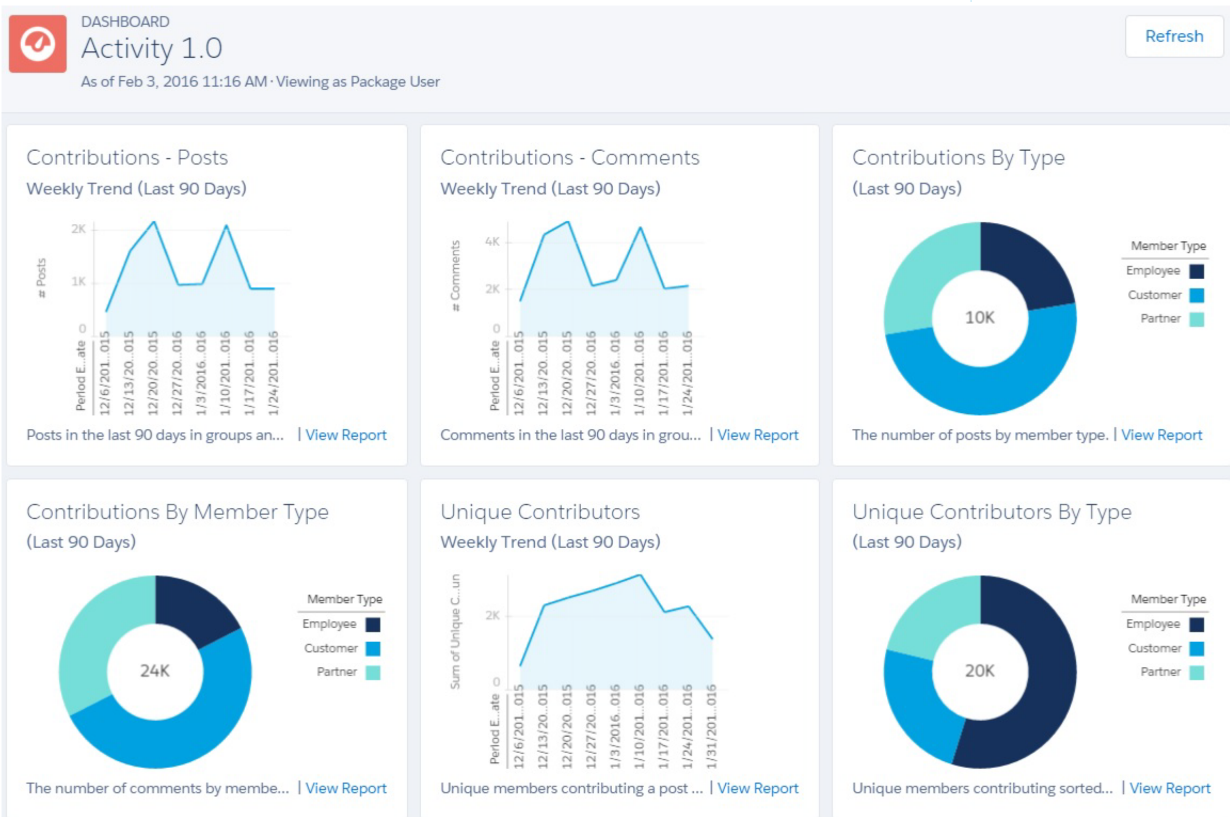
Use Dashboards to view your community's analytics, such as metrics and trends on activity. Dashboards give you mid-term to long-term views on adoption and engagement in your community. They help you monitor return on investment (ROI) and key performance indicators (KPI).

You can visit the**Dashboards tile** > **Dashboards** > **Activity** page to track total posts and comments including overall contribution trends in your community.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions



Service Community Scorecard

Some of the most common feedback we get is that community managers need a single dashboard providing information about the success of a community. In Summer '17, we announced the Service Community Scorecard. It gives community managers for self-service and support communities the information they need all in one place. If your community is not a service community, use it as inspiration or a starting point to create your own scorecard.

How do you get the Service Community Scorecard? If you are installing this package for the first time, it automatically maps to your dashboards home tab. If you are updating to this package, you have to map manually.

Got it? Great! We prepopulated the scorecard to get you up and running. However, you can always customize it to best fit your community. More info on that part in a bit. Here's what you start out with:

- **Membership**: Three reports, broken down into contributors and observers. Make sure that Reputation is on to get the most out of the Top 10 Members by Reputation report.
  - Total Members
  - Daily Active Users
  - Top 10 Members by Reputation
- **Information Discovery**: Two reports that show what users are not finding in the community. A great report to add next to these new reports is "Most Viewed Articles", but it's part of a different AppExchange package. See https://appexchange.salesforce.com/listingDetail?listingId=a0N30000003HXO9EAO for details.
  - Top Unanswered Questions
  - Searches with No Results (30 Days)
- **New Members**: Three reports that tell you how many new members have joined your community and whether they have profile photos, a strong sign of their engagement.
  - New Members (7 Days)
  - New Members with Profile Pic
  - New Members (90 Days)
- **Cases**: Three reports all about customer cases. These reports include all cases in your org, not just those cases created through the community. We recommend marking cases created in the community so you can filter to just those particular cases.
  - Cases Opened
  - Case Resolution Time
  - Oldest Open Cases
- **Topics and Questions**: Two reports that let you keep tabs on hot topics and open questions vs. questions that have been marked with a best answer.
  - Topics Most Talked About 3.0
  - Questions vs. Best Answers

Ready to customize the Service Community Scorecard or use it to create your own scorecard? Go to your internal org and click the Dashboard tab. Search for "Service Community Scorecard" and click **Edit** to add or remove reports or change the name of your scorecard.

SEE ALSO:

Enable and Map Dashboards

Experience Management Insights

The Salesforce Communities Management package provides a set of reports that let you monitor recent activity and drill down to the source to take further action.

Important: Insights are only available in the Communities Management AppExchange package with Chatter.

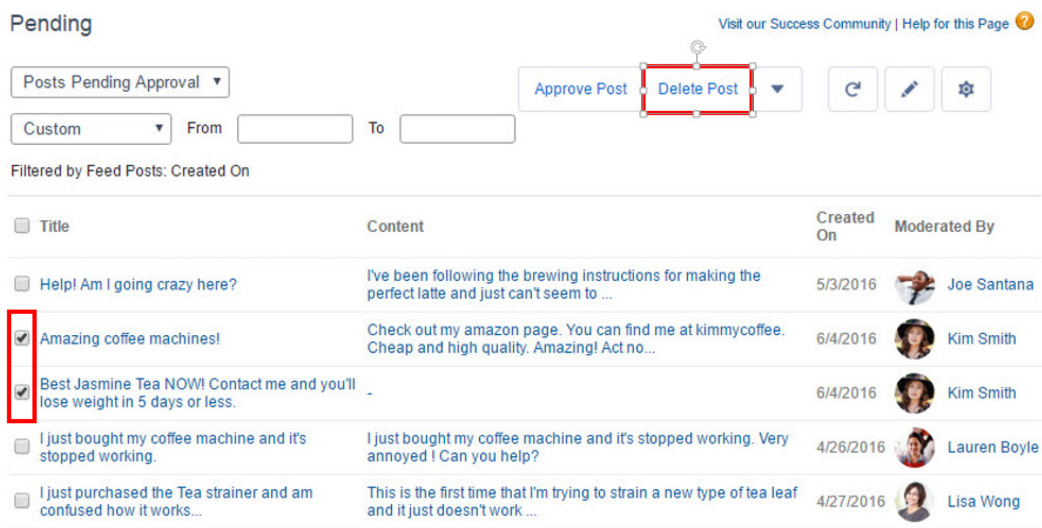
When you view Insights in Experience Management or Experience Workspaces, reports automatically display data specific to the community you're managing. Insights reports are arranged into two sections in the Dashboards workspace, Engagement and Moderation.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

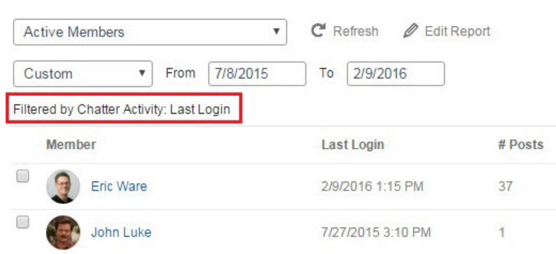
Actionable Insights are available in all orgs with Communities. All you need is a report to use them with. Each Insights report has different actions. Insights report, click to edit the actions assigned to the report. You can find more information about viewing, customizing and configuring Insights and actions in the Salesforce help.



Tip: Insights let you know how the report is filtered.

You can edit this label to be more descriptive.

1. Use the tables in this document to identify the custom report type for your Insights report.
2. In your internal Salesforce org, from Setup enter `Report Types` in the Quick Find box, and then select **Report Types**.
3. Click the name of the custom report type you want to edit, then click **Edit Layout**.
4. To change a label, select the field you want to update and click **Edit Properties** and then save your work.
5. Verify your changes in Experience Management or Experience Workspaces.



You can learn more about editing field layouts in the Salesforce Help.

IN THIS SECTION:

Adoption Insights

Use the Adoption Insights page to monitor member activity.

Activity Insights
Use the Activity Insights page to track posts and comments in groups.

Files Insights
Use the Files Insights page to monitor file uploads and downloads, including files receiving lots of comments. With Files Insights, you can monitor files by community engagement and file type.

Groups Insights
Use the Groups Insights page to help manage your groups.

Moderation Insights
Use the Moderation Insights page to track flagged posts, files, messages, and content flagged by moderation rules.

Self-Service Insights
Use the Self-Service Insights page to track questions and answers in user profiles, including questions escalated to cases.

Topics Insights
Use the Topics Insights page to keep an eye on recent topics.

Adoption Insights

Use the Adoption Insights page to monitor member activity.

With Adoption Insights, you can:

- Identify and welcome your new members
- Drive adoption and engagement in your community
- Re-engage with your community's top contributors

Report Name	Description	Custom Report Type
Active Members	Members who logged in to your community in the last 7 days with Chatter activity, such as a post or like.	Network Member Activity 1.0
Active Members With No Picture	Members without a user profile picture who logged in to your community in the last 7 days.	Chatter Activity 1.0
Contributors Inactive For 7+ Days 2.0	Members with the most posts and comments who are now inactive. These members haven't logged in to the community in the last 7 days, but have logged in once during the last 30 days. This report includes only members with more than 5 posts or 5 comments. **Important:** Adjust the report filters to fit your community.	Network Member Activity 1.0
Influencers Inactive For 7+ Days 2.0	Members with the most likes and comments received who are now inactive. These members haven't posted in the last 7 days, but have logged in to the community in the last 30 days. This report includes only members with at least 5 likes or 5 received comments. **Important:** Adjust the report filters to fit your community.	Network Member Activity 1.0

Report Name	Description	Custom Report Type
Influencers With No Picture	Members with the most likes and comments received, who have no user profile picture. This report includes only members with at least 5 likes or 5 received comments. **Important:** Adjust the report filters to fit your community.	Chatter Activity 1.0
New Contributors With No Picture	Members without a user profile picture, who registered in the last 7 days and also posted or commented recently.	Chatter Activity 1.0
New Active Members	New members who registered in the last 7 days. For the package with Chatter. the report also includes Chatter activity, such as a post or like.	Network Member Activity 1.0
Recent Contributors 2.0	New members active in Chatter groups or user profiles in the last 7 days, sorted by most recent activity.	Network Members 3.0
Recent Contributors With No Picture	New members without a user profile picture, active in Chatter groups or user profiles in the last 7 days, sorted by most recent activity.	Network Members 3.0
Recent Logins Successful	External users with the most recent successful logins to the community during the last 7 days. This report only includes direct logins to the community. If a user logs into an org and then switches to a community, their login activity isn't included.	Network Login History 5.0

Activity Insights

Use the Activity Insights page to track posts and comments in groups.

With Activity Insights, you can:

- Moderate recent discussions, including identifying posts with no comments
- Monitor your community’s hot discussions
- Moderate group activity from new members

Report Name	Description	Custom Report Type
New Discussions 2.0	New group discussions created in the last 7 days, sorted by the newest post.	Network Groups Activity 3.0
New Members' Comments 2.0	Group comments created in the last 7 days by a member who registered in the last 30 days. This report is sorted by the highest number of likes.	Network Groups Activity 3.0
New Members' Posts 2.0	Group posts created in the last 7 days by a member who registered in the last 30 days.	Network Groups Activity 3.0
Recent Discussions	Group discussions created in the last 30 days.	Network Groups Activity 3.0

Files Insights

Use the Files Insights page to monitor file uploads and downloads, including files receiving lots of comments. With Files Insights, you can monitor files by community engagement and file type.

Report Name	Description	Custom Report Type
Files With Activity	Files with comments, likes, or downloads.	File and Content Report
New Image Files 2.0	Image files uploaded in the last 7 days, sorted by the most recent upload.	File and Content Report
New Office Files 3.0	Office files uploaded in the last 7 days, sorted by the most recent upload.	File and Content Report
New Video Files 2.0	Video files uploaded in the last 7 days, sorted by the most recent upload.	File and Content Report
Recent Files (All) 2.0	Files uploaded in the last 7 days, sorted by the most recent upload.	File and Content Report

Groups Insights

Use the Groups Insights page to help manage your groups.

With Groups Insights, you can:

- Moderate newly created groups
- Manage groups with deactivated or inactive owners
- Manage groups that will soon be archived

Report Name	Description	Custom Report Type
Best Answers From Groups 1.0	Best Answers created in last 7 days from Groups, sorted by the most recent answers.	Network Group Q&A Activity 1.0
Groups Recently Archived 2.0	Groups that were automatically archived in the last 15 days, sorted by the most recent contribution date. The report doesn't include groups manually archived by a user.	Network Group Membership 3.0
Groups Soon To Be Archived 2.0	Groups that are scheduled to be archived in the next 15 days, sorted by the soonest archive date.	Network Group Membership 3.0
Groups With Deactivated Owners 2.0	Groups with owners that are deactivated. These groups are active and haven't been archived.	Network Group Membership 3.0
Groups With Inactive Owners 2.0	Groups with owners who didn't log in to the community in the last 30 days. These groups are active and haven't been archived.	Network Group Membership 3.0
New Groups	Groups added in the last 7 days.	Network Group Membership 3.0
Questions From Groups 1.0	Questions created in the last 7 days from groups, sorted by most recent.	Network Groups Q & A Activity 1.0
Questions With New Answers From Groups	Questions with answers created in last 7 days from groups, sorted by most recent answer.	Network Groups Q & A Activity 1.0

Report Name	Description	Custom Report Type
Questions Without Answers From Groups 1.0	Questions created in the last 7 days without answers from groups, sorted by most recent question.	Network Groups Q & A Activity 1.0
Questions With Answers From New Groups 1.0	Questions created in the last 7 days with answers from new groups, sorted by most recent question.	Network Groups Q & A Activity 1.0
Questions From New Groups 1.0	Questions created in the last 7 days from groups, sorted by most recent question.	Network Groups Q & A Activity 1.0

Moderation Insights

Use the Moderation Insights page to track flagged posts, files, messages, and content flagged by moderation rules.

With Moderation Insights, you can:

- Monitor content blocked, flagged, or replaced by rules
- Monitor spammers or new members
- Monitor types of flagged messages including notes from customer
- Monitor private messages from new members (for details, see the Misc Communities Reports section)

Report Name	Description	Custom Report Type
Flagged Comments 3.0	Comments flagged in the last 7 days.	Network Moderation Flagged Comments 2.0
Flagged Files 3.0	Files flagged in the last 7 days.	Network Moderation Flagged Files 2.0
Flagged Private Messages 3.0	Chatter messages flagged in the last 7 days.	Network Moderation Flagged Messages 2.0
Flagged Direct Messages 2.0	Direct Messages flagged in the last 7 days.	Network Moderation Flagged Direct Messages 1.0
Flagged Posts 3.0	Posts flagged in the last 7 days.	Network Moderation Flagged Posts 2.0
Frozen Members 2.0	Members frozen in the last 7 days.	Network Frozen Members 2.0
Posts Pending Approval	Feed posts pending approval.	Network Posts Pending Approval 2.0
Moderation Audit 2.0	All moderation audits in the last 7 days. This includes flagging by users, moderation rules, and moderator actions.	Network Activity Audit 1.0

Self-Service Insights

Use the Self-Service Insights page to track questions and answers in user profiles, including questions escalated to cases.

With Self-Service Insights, you can monitor and act on:

- Recently-created questions

- Questions and answers from new members to help drive adoption
- Questions escalated to cases (for details, see the Misc Communities Reports on page 771 section)

Note: This Insights page supports communities using the Customer Service template.

Report Name	Description	Custom Report Type
Best Answers 2.0	Questions with a best answer added in the last 7 days.	Network User Activity 3.0
Best Answers From External Members 2.0	Questions with a best answer from an external user added in the last 7 days.	Network User Activity 3.0
Questions 2.0	Questions added in the last 7 days.	Network User Activity 3.0
Questions From New Members 2.0	Questions added in the last 7 days by new members. A member is considered new if they joined the community less than 30 days ago.	Network User Activity 3.0
Questions With Answers From New Mem 2.0	Questions with answers from new members in the last 7 days. A member is considered new if they joined the community less than 30 days ago. This report is sorted by the most recent question.	Network User Activity 3.0
Questions With New Answers 2.0	Questions with a new answer that has been added in the last 7 days. This report is sorted by the most recent answer.	Network User Activity 3.0
Questions Without A Best Answer 2.0	Questions with answers in the last 7 days that still don't have a best answer.	Network User Activity 3.0
Questions Without Answers 2.0	Questions added in the last 7 days that haven't been answered.	Network User Activity 3.0
Questions With and Without Best Answers	All community questions, including answer count, and whether there is a best answer.	Network Feed Activity

Topics Insights

Use the Topics Insights page to keep an eye on recent topics.

With Topics Insights, you can:

- Manage topic assignments
- Monitor new topics

Report Name	Description	Custom Report Type
Topics Added 2.0	Topics created in the last 7 days.	Network Topics 3.0
Topics Assigned 2.0	Topics assigned in the last 7 days.	Network Topic Assignments 3.0
Topics Most Talked About 2.0	Topics created in the last 7 days with the highest “Talked About” score.	Network Topics 3.0

Community Management Dashboards Descriptions

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

The Salesforce Communities Management package provides a set of dashboards, each with its own source reports, and a set of custom report types. The available reports depend on whether you install the package for communities that have Chatter, or the package for communities that don't.

After installing the package, when you view the dashboards from Experience Management or Experience Workspaces, reports automatically display data specific to the community you're accessing the report from. To view data from across all your communities, view the dashboard in your internal Salesforce org.

Important: For the package without Chatter, you only get: two home dashboards and the Overview, Members, and Licenses Usage dashboards.

Note:

- Trending metrics are calculated daily and the calculation starts the day after a release. Trending metrics work only in Salesforce orgs with an active status. To collect trending metrics in non-active orgs, contact Salesforce.
- Filtering is not supported on standard report types.

IN THIS SECTION:

Service Community Scorecard

Use the Service Community Scorecard dashboard to track member use, service metrics, and search activity.

Home Dashboard and Reports

When you access Experience Management, your home dashboard is the first thing you see. It ensures that you stay up to date and is customizable to fit your community needs.

Overview Dashboard and Reports

Use the Overview dashboard to track membership growth, login trends, and members' post and comment activity in Chatter.

Activity Dashboard and Reports

Use the Activity dashboard to track engagement and activity levels, based on members' Chatter activity.

Chatter Edits Reports

Use these reports to track Chatter edits in your community.

Community Search Dashboard and Reports

Use the Community Search Dashboard to track search activity in the community.

Files Dashboard and Reports

Use the Content dashboard to track content uploads, downloads, engagement, and content creators.

Custom Recommendations Dashboard and Reports

Use the Custom Recommendations dashboard to see how your community's custom recommendations are doing.

Groups Dashboard and Reports

Use the Groups dashboard to monitor feed and member activity in Chatter groups.

Members Dashboard and Reports

Use the Members dashboard to track community membership, new members added, and external member logins over time.

Moderation Dashboard and Reports

Use the Moderation dashboard to track community moderators' and members' flagging activity.

Q&A Dashboard and Reports

Use the Q & A dashboard to track recent activity for questions, answers, and best answers posted in groups

Self-Service Dashboard and Reports

The Self-Service dashboard tracks activity in the self-service template.

Question Response Time Dashboard and Reports

Use the Question Response Time dashboard and reports to determine how long it takes for questions to get a response.

Topics Dashboard and Reports

Use the Topics dashboard to track your community topics.

Misc Communities Reports

The reports provided in this folder are feature-dependent or require special user permissions. You can add these reports to Insights folders or dashboards in Experience Management or Experience Workspaces. These reports are provided in the **Misc Communities Reports** folder.

Service Community Scorecard

Use the Service Community Scorecard dashboard to track member use, service metrics, and search activity.

Understanding the health of your self-service community takes more than just keeping up with spam. Healthy communities allow for effective collaboration, provide quick resolutions to issues, and are full of engaged, active members. The Service Community Scorecard helps you track all this information in one place.

Report Name	Description	Custom Report Type
Total Members	Total Number of community members.	Network Members 3.0
Daily Active Users	Daily report of contributors and observers in the community.	Network User Participation Daily Metrics
Top 10 Members By Reputation	Top 10 community members ranked by Reputation points.	Network Members 2.0
Top Unanswered Questions	Top unanswered questions with the most likes.	Network User Activity 2.0
Searches With No Results (30 Days)	Searches yielding zero results within the last 30 days.	Community Search 2.0
New Members (7 Days)	New members within the last 7 days.	Network Members 3.0
New Members with Profile Pic	New member report indicating which members have added a profile picture and which have not.	Network Members 3.0
New Members (90 Days)	New members within the last 90 days.	Network Membership Daily Metrics 2.0
Cases Opened	Ratio of open cases to closed cases.	Cases
Case Resolution Time	Weekly report on the average case resolution time.	Cases
Oldest Open Cases	Report on open cases ranked from oldest to newest.	Cases
Topics Most Talked About 3.0	Topics created in the last 7 days with the highest “Talked About” score.	Network Topics 3.0

Report Name	Description	Custom Report Type
Questions vs. Best Answers	Daily report comparing the number of questions asked to the number of best answers given.	Network Activity Daily Metrics 2.0
Active Members	Number of active members.	Network Members 3.0

Home Dashboard and Reports

When you access Experience Management, your home dashboard is the first thing you see. It ensures that you stay up to date and is customizable to fit your community needs.

In Summer '17, we are shipping a new dashboard called Service Community Scorecard as the default Home dashboard. If you have a service community, this is definitely the Home dashboard you will want to use.

If you have another type of community, you may want to pick from the older set of Home dashboards available. We provide dashboards for short-term and long-term data, with options for self-service communities and communities with or without Chatter.

Note: If you are installing the package for the first time, you will automatically see the Service Community Scorecard as your Home dashboard. If you are upgrading, you will have to map the scorecard to Home manually.

To change the mapping of the dashboard, go to **Dashboards** > **Settings** in Experience Management. If you've enabled Experience Workspaces, the Home dashboard is in the Dashboards workspace.

IN THIS SECTION:

Home Dashboards

For the package with Chatter, these dashboards are provided in the **Lightning Communities Dashboards** folder. For the package without Chatter, these dashboards are in the **Community Management Home Dashboards** folder.

Home Reports

These reports are provided in the **Community Management Home Reports** folder.

Home Dashboards

For the package with Chatter, these dashboards are provided in the **Lightning Communities Dashboards** folder. For the package without Chatter, these dashboards are in the **Community Management Home Dashboards** folder.

Dashboard Name	Description	Package with Chatter	Package Without Chatter
Service Community Scorecard	Dashboard for communities with Chatter.	✓	
Activity in Your Community in the Last 90 Days		✓	

Dashboard Name	Description	Package with Chatter	Package Without Chatter
Activity in Your Community in the Last 12 Months		✓	
Activity in Your Self-Service Community in the Last 90 Days	Dashboard for self-service communities, such as communities using the Napili template.	✓	
Activity in Your Self-Service Community in the Last 12 Months		✓	
Activity in Your Community in the Last 30 Days	Dashboard for communities without Chatter.		✓
Activity in Your Community in the Last 12 Months			✓

Home Reports

These reports are provided in the **Community Management Home Reports** folder.

Report Name	Description	Custom Report Type	Package with Chatter	Package Without Chatter
Active Contributors	Total number of members who created a post or comment in the last 30 days in groups of user profiles.	Network Login History 5.0	✓	
Active Users	Total number of external users who logged in at least once in the last 30 days.	Network Login History 5.0	✓	✓
Answers	Total number of answers in the last 30 days.	Network Activity Daily Metrics 2.0	✓	
Best Answers	Total number of best answers in the last 30 days.	Network Activity Daily Metrics 2.0	✓	
Best Answers - Daily Trend	Daily trending report on best answers in the last 30 days.	Network Activity Daily Metrics 2.0	✓	
Best Answers - Monthly Trend	Monthly trending report on best answers in your community.	Network Activity Daily Metrics 2.0	✓	
Best Answers - Weekly Trend	Weekly trending report on best answers in your community.	Network Activity Daily Metrics 2.0	✓	
Comments	Total number of comments in groups and user profiles in the last 30 days.	Network Activity Daily Metrics 2.0	✓	
Contributions	Total number of posts and comments in the last 30 days across groups and user profiles.	Network Activity Daily Metrics 2.0	✓	

Report Name	Description	Custom Report Type	Package with Chatter	Package Without Chatter
Contributions - Monthly Trend	Monthly trending report on the number of posts and comments in groups or user profiles in your community.	Network Activity Daily Metrics 2.0	✓	
Contributions - Weekly Trend	Weekly trending report on the number of posts and comments in groups or user profiles in the last 90 days.	Network Activity Daily Metrics 2.0	✓	
File Activity - Monthly Trend	Monthly trending report on the total number of files uploaded and downloaded in groups or user profiles in the last 12 months.	File and Content Report	✓	
File Downloads	Total number of files downloaded from groups or user profiles in the last 30 days.	File and Content Report	✓	
File Uploads	Total number of files uploaded to groups or user profiles in the last 30 days.	File and Content Report	✓	
Logins	Total number of logins to the community in the last 30 days.	Network Membership Daily Metrics 2.0	✓	✓
Logins - Daily Trend	Daily trending report on member logins in the last 30 days. This report doesn't include employees who log in to your internal Salesforce org and then switch to the community.	Network Membership Daily Metrics 2.0	✓	
Logins - Monthly Trend	Monthly trending report on member logins in your community. This report doesn't include employees who log in to your internal Salesforce org and then switch to the community.	Network Membership Daily Metrics 2.0	✓	
Logins External - Monthly Trend	Monthly trending report on customer and partner member logins in your community. This report doesn't include logins from employees.	Network Membership Daily Metrics 2.0	✓	
Members	Total number of members in the community.	Network Members 3.0	✓	✓
New Members	Total number of new members added to the community in the last 30 days.	Network Membership Daily Metrics 2.0	✓	✓
New Members - Monthly Trend	Monthly trending report on new members added in your community.	Network Membership Daily Metrics 2.0	✓	✓
Page Views - Monthly Trend	Monthly trending report on the daily page views generated by guest users in your community.	Network Public Usage Daily Metrics 2.0	✓	
Page Views - Weekly Trend	Weekly trending report on the daily page views generated by guest users in your community.	Network Public Usage Daily Metrics 2.0	✓	
Posts	Total number of posts in groups and user profiles in the last 30 days.	Network Activity Daily Metrics 2.0	✓	

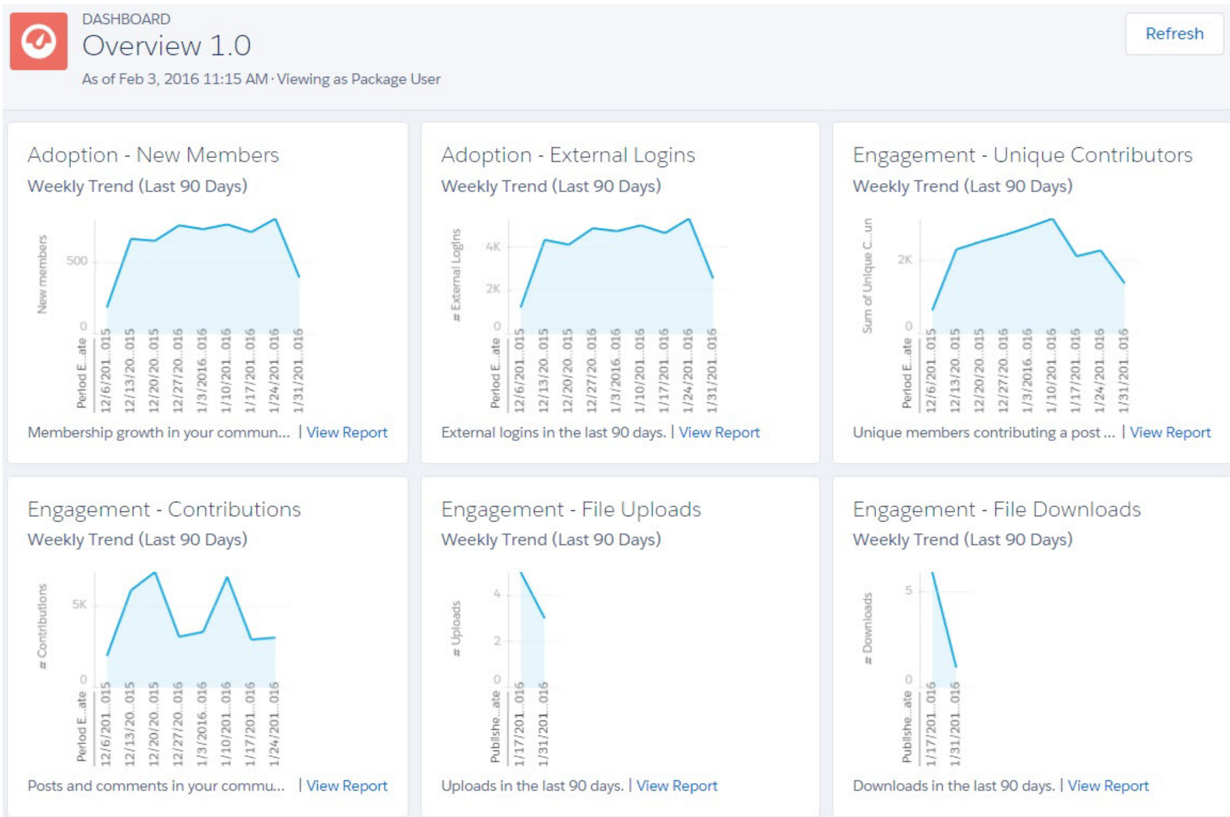
Report Name	Description	Custom Report Type	Package with Chatter	Package Without Chatter
Q&A - Monthly Trend	Monthly trending report on questions and answers in your community.	Network Activity Daily Metrics 2.0	✓	
Q&A - Weekly Trend	Weekly trending report on questions and answers in your community.	Network Activity Daily Metrics 2.0	✓	
Questions	Total number of questions in the last 30 days.	Network Activity Daily Metrics 2.0	✓	
Topics	Total number of topics assigned to discussions in groups or user profiles in the last 30 days.	Network Topic Assignments 3.0	✓	
Total Daily New Members	Total number of new members added to the community in the last 30 days.	Network Membership Daily Metrics 2.0	✓	✓
Unique Contributors - Daily Trend	Daily trending report on the number of unique daily contributors in the last 30 days. A unique contributor is someone who posts or comments at least once in groups or user profiles.	Network Public Usage Daily Metrics 2.0	✓	
Unique Contributors - Monthly Trend	Monthly trending report on the average unique daily contributors in your community. A unique contributor is someone who posts or comments at least once in groups or user profiles.	Network Unique Contributor Daily Metrics 2.0	✓	
Unique Visitors - Monthly Trend	Monthly trending report of the daily unique visitors, people that visited the community at least once that day, in the last 12 months.	Network Public Usage Daily Metrics 2.0	✓	

Overview Dashboard and Reports

Use the Overview dashboard to track membership growth, login trends, and members' post and comment activity in Chatter.

With this dashboard, you can see:

- How contributions are trending
- How group membership is trending
- How topics and assignments are trending
- How question and answers are trending
- How files are trending



Important: For information about the reports provided in the Overview dashboard for the package without Chatter, refer to what's installed in your org.

Report Name	Description	Custom Report Type	On Dashboard?
C - File Activity L90D	Reports on the number of uploads and downloads in your community in the last 90 days.	File and Content Report	✓
Contributions - Weekly Trend	Weekly trending report on the number of posts and comments in groups or user profiles in the last 90 days.	Network Activity Daily Metrics 2.0	✓
Daily Unique Contributors (Last 90 Days)	Unique members contributing a post or comment in the last 90 days.	Network Unique Contributor Daily Metrics 2.0	✓
MO - Flags L90D	Trending report of flagged content in your community in the last 90 days.	Network Moderation 2.0	✓
New Members (Last 90 Days Trend)	Newly joined members in the last 90 days.	Network Membership Daily Metrics 2.0	✓
O - External Logins L90D	External logins by community member type in the last 90 days.	Network Membership Daily Metrics 2.0	✓

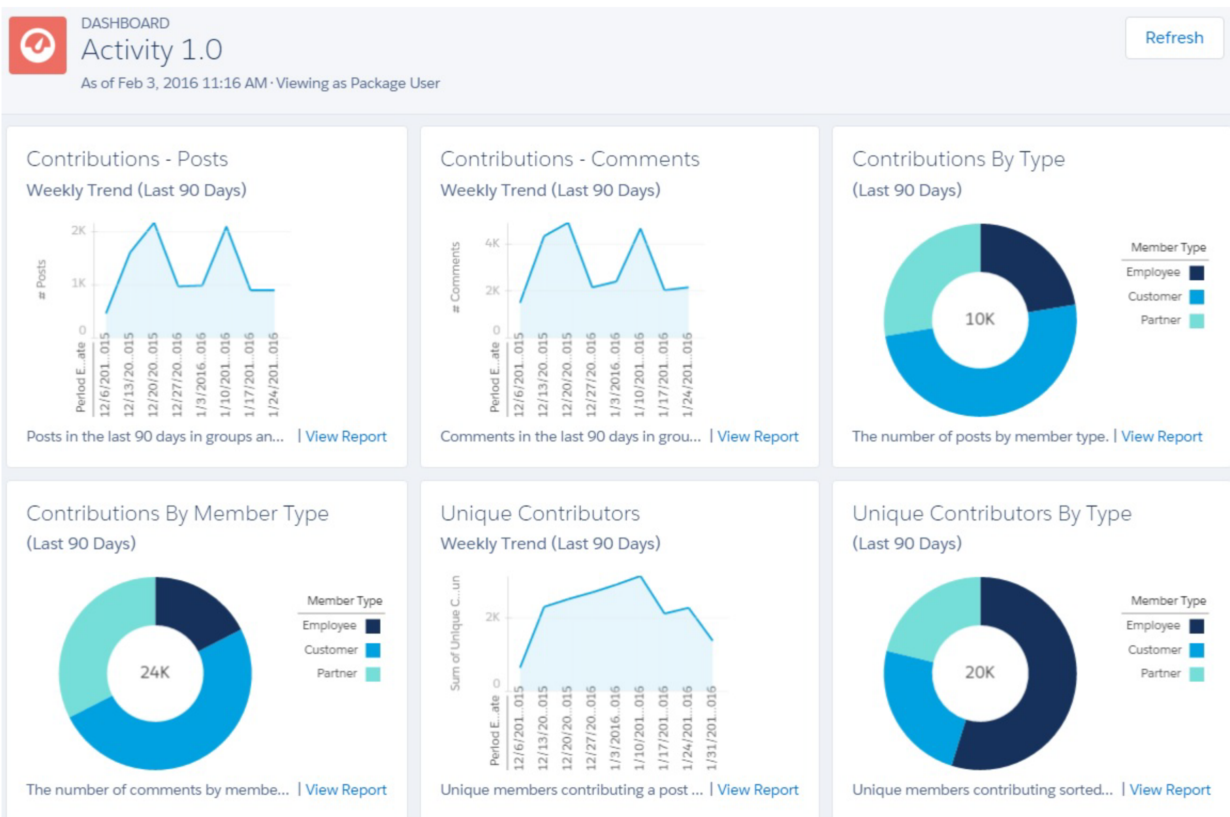
Report Name	Description	Custom Report Type	On Dashboard?
T - Topics Assigned L90D	Topics assigned in the last 90 days.	Network Topic Assignments 3.0	✓
T - Topics Created L90D	Topics added in the last 90 days.	Network Topics 2.0	✓

Activity Dashboard and Reports

Use the Activity dashboard to track engagement and activity levels, based on members' Chatter activity.

With this dashboard, you can answer:

- How many posts and comments are there?
- How many members are contributing and are there any members that aren't contributing?
- Which posts are the most commented on or liked?



Important: This dashboard and its reports are *only* available in the package with Chatter.

Report Name	Description	Custom Report Type	On Dashboard?
A - # Comments	Total number of comments in groups and user profiles.	Network Activity Daily Metrics 2.0	
A - # Comments L30D	Total number of comments in groups and user profiles in the last 30 days.	Network Activity Daily Metrics 2.0	
A - # Comments Per Post	The average number of comments per post.	Network Activity Daily Metrics 2.0	
A - # Comments Per Post L30D	The average number of comments per post in the last 30 days.	Network Activity Daily Metrics 2.0	
A - # Members Contributing L30D	Members who have contributed to Chatter in the last 30 days.	Network Members 2.0	
A - # Members Who Never Contributed	Members who have never contributed to Chatter.	Network Members 2.0	
A - # Posts	Total number of posts in groups and user profiles.	Network Activity Daily Metrics 2.0	
A - # Posts L30D	Total number of posts in groups and user profiles in the last 30 days.	Network Activity Daily Metrics 2.0	
A - Contributions By Member Type L90D	Trending report on posts and comments in the last 90 days in groups and user profiles, sorted by member type.	Network Activity Daily Metrics 2.0	✓
A - Contributions L90D	Trending report on posts and comments in the last 90 days in groups and user profiles.	Network Activity Daily Metrics 2.0	✓
A - Unique Contributors By Type L90D	Unique members contributing a post or comment in the last 90 days.	Network Unique Contributor Daily Metrics 2.0	✓
Daily Unique Contributors (Last 90 Days)	Unique members contributing a post or comment on a given day in the last 90 days.	Network Unique Contributor Daily Metrics 2.0	✓

Chatter Edits Reports

Use these reports to track Chatter edits in your community.

These reports aren't associated with a dashboard, but you can find them in the Communities Reports folder.

Important: These reports are *only* available in the package with Chatter.

Tip: If you want to report on Chatter edits in your internal Salesforce org, use the reports in the **Chatter Reports** folder.

Report Name	Description	Custom Report Type
CH - # Chatter Edits	Number of Chatter edits made in the community.	Network Chatter Edits 1.0

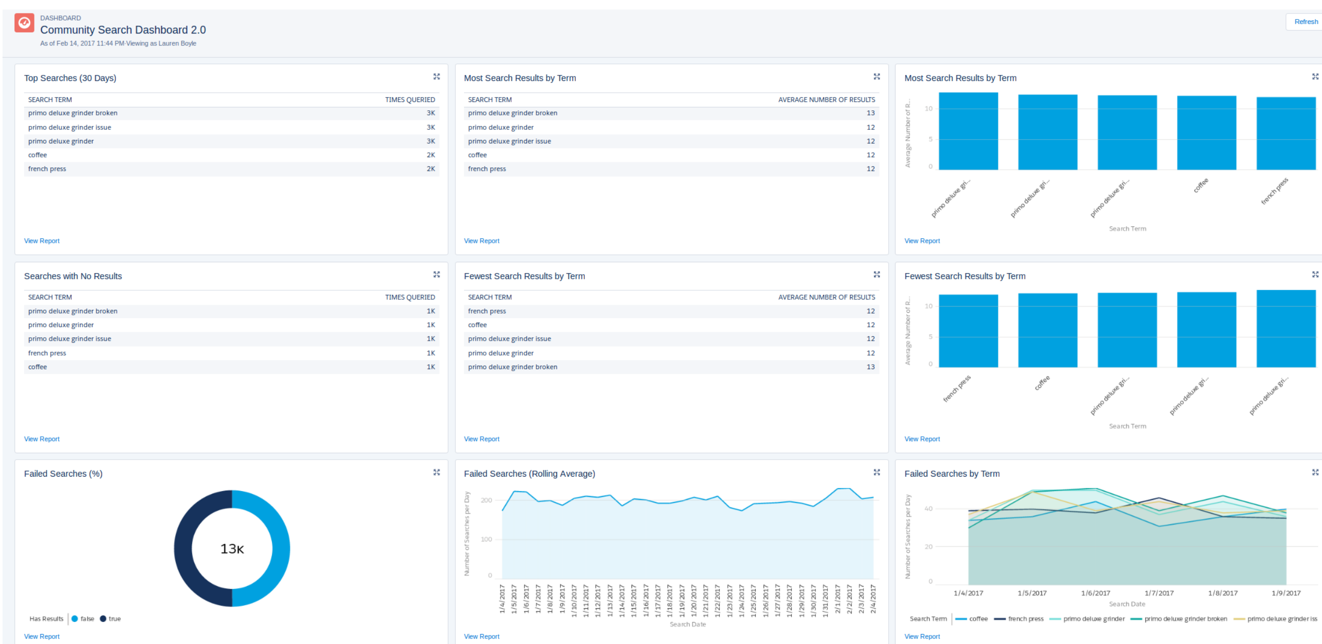
Report Name	Description	Custom Report Type
CH - Chatter Edits By Feed Type	Distribution of community Chatter edits by feed type: posts or comments.	Network Chatter Edits 1.0
CH - Chatter Edits By Member Type	Distribution of community Chatter edits by member type: internal, partner, or customer.	Network Chatter Edits 1.0
CH - Daily Chatter Edits L30D	Daily trend of Chatter edits in the community.	Network Chatter Edits 1.0

Community Search Dashboard and Reports

Use the Community Search Dashboard to track search activity in the community.

With the Community Search Dashboard, you can track:

- Which search terms are community members using?
- How many members are searching for a term on a specific day?
- How many community users are logged in when they enter a search term?
- What type of community member is searching for a term?



Important: This dashboard and its reports are available *only* in communities using the Customer Service template using an uncustomized Search component. Search reports can only run in production environments. Reports show the last 30 days of information because that is the amount of information stored. Metrics are tracked only in the Global Search Results component.

Report Name	Description	Custom Report Type	On Dashboard?
Autocomplete Click-Through % (Last 30 Days)	What percentage of autocomplete search results had a successful click?	Community Searches 2.0	✓

Report Name	Description	Custom Report Type	On Dashboard?
Autocomplete Search Usage (30 Days)	Are users clicking on suggested search results?	Community Searches 2.0	✓
Logged-In vs Guest Search (Last 30 Days) 2.0 Note: This report has been enhanced in the current package.	How many community users are logged in when they enter a search term?	Community Searches 2.0	✓
Most Autocomplete Clicks (30 Days)	Which search terms led to the most clicks of suggested search results?	Community Searches 2.0	✓
Number of Results Per Term (30 Days)	How many search results are returned per search term?	Community Searches 2.0	✓
Search Frequency by Term (Last 30 Days) 2.0 Note: This report has been enhanced in the current package.	Which search terms are community members using?	Community Searches 2.0	✓
Searches by Member Type (Last 30 Days) 2.0 Note: This report has been enhanced in the current package.	What type of community member is searching for a term?	Community Searches 2.0	✓
Search Result Outcomes (30 days)	How many searches had results?	Community Searches 2.0	✓
Searches w/ No Results, by Day (30 Days)	Which search terms had zero results on any given day?	Community Searches 2.0	✓
Searches w/ No Results by Type (30 Days)	What type of community member is searching for a term, and did it have results?	Community Searches 2.0	✓
Searches with Zero Results (30 Days)	How many search results are returned per search term?	Community Searches 2.0	✓

Files Dashboard and Reports

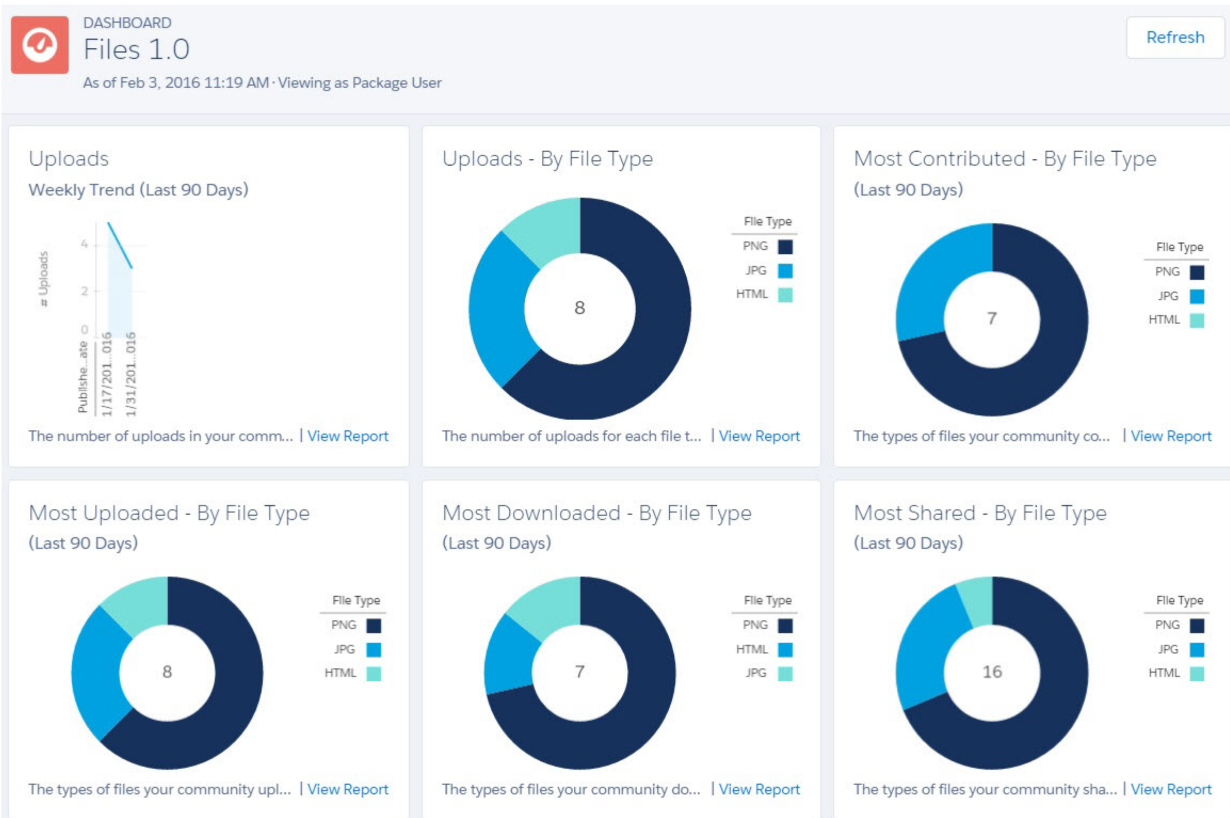
Use the Content dashboard to track content uploads, downloads, engagement, and content creators.

With this dashboard, you can answer:

- How many file uploads and downloads are there?
- Are there any file trends?
- What type of files are being distributed the most or least?

- How is file engagement?
- Which members are driving file engagement?

Important: This dashboard and its reports are *only* available in the package with Chatter.



Report Name	Description	Custom Report Type	On Dashboard?
C - # File Contributions	The total number of file contributions, defined as posts and comments.	File and Content Report	
C - # File Downloads	The total number of files downloaded.	File and Content Report	
C - # File Likes	The total number of file likes.	File and Content Report	
C - # File Shares	The total number of files shares.	File and Content Report	
C - # File Uploads	The total number of files uploaded.	File and Content Report	
C - File Activity By File Type L90D	Reports on the types of files uploaded and downloaded in your community.	File and Content Report	✓

Report Name	Description	Custom Report Type	On Dashboard?
C - File Activity L90D	Reports on the number of uploads and downloads in your community in the last 90 days.		✓
C - File Sharing Monthly	Monthly trending report on the number of file shares in your community.	File and Content Report	
C - File Uploads Distribution By Type	Distribution of files uploaded by file type.	File and Content Report	✓
C - New Files Trending By Contributions	Files uploaded in the last 30 days with the most posts and comments.	File and Content Report	
C - New Files Trending By Downloads	Files uploaded in the last 30 days with the most downloads.	File and Content Report	
C - New Files Trending By Likes	Files uploaded in the last 30 days with the most likes.	File and Content Report	
C - Top 10 Users - Most File Contrib L30D	Top 10 users who received the largest number of posts and comments on their files in the last 30 days. Note: This report is not included on the Content dashboard. If you want to use it, edit the dashboard and remove an existing report to add it.	File and Content Report	
C - Top 10 Users - Most File Likes L30D	Top 10 users who received the largest number of likes on their files in the last 30 days. Note: This report is not included on the Content dashboard. If you want to use it, edit the dashboard and remove an existing report to add it.	File and Content Report	
C - Top 10 Users - Most File Uploads	Top 10 users who uploaded the largest number of files.	File and Content Report	

Custom Recommendations Dashboard and Reports

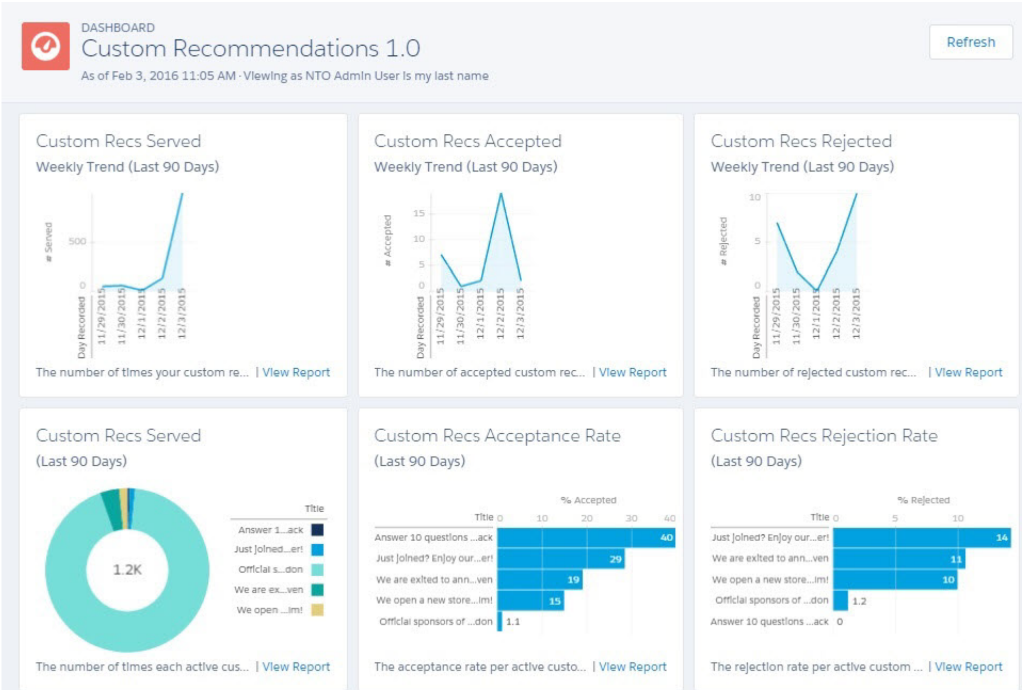
Use the Custom Recommendations dashboard to see how your community's custom recommendations are doing.

You can see how often your recommendations are viewed, clicked, or dismissed. You can view data for individual recommendations or across channels.

With this dashboard you can answer:

- Which recommendations are being clicked the most?
- Which recommendations are being rejected the most?
- Are my custom channels helping my recommendations?

Important: This dashboard and its reports are *only* available in the package with Chatter.



IN THIS SECTION:

[Recommendations FAQ](#)
Frequently asked questions about recommendations.

Recommendations FAQ

Frequently asked questions about recommendations.

What does it mean when a recommendation is served?

A recommendation is served when it's displayed on a page, including when the page refreshes.

What does it mean when a recommendation is accepted?

A recommendation is accepted when a member clicks the button text, such as "Buy Now."

What does it mean when a recommendation is rejected?

A recommendation is rejected when a member clicks "I'm not interested."

How is the acceptance rate calculated?

The acceptance rate equals the total number of times a member clicks the recommendation, divided by the total number times the recommendation was served (displayed) in your community. For example, if a custom recommendation is clicked by 100 members and it was served 1,000 times, the acceptance rate is 10%.

How is the rejection rate calculated?

The rejection rate equals the total number of times a member dismisses the recommendation, divided by the total number of times the recommendation was served (displayed) in your community. For example, if a custom recommendation is dismissed 100 times and it was served 1,000 times, the rejection rate is 10%.

What are channels?

Channels group recommendations together so you can determine where they show up in your community.

Report Name	Description	Custom Report Type	On Dashboard?
R - Channel Recommendations Details	Details for your custom recommendation channels. This includes information about your channels being served the most, accepted the most, or rejected the most.	Network Custom Recommendations 1.0	✓
R - Channel Recommendations L90D	Custom recommendation channel trends by acceptance rate, rejection rate, and number of times it was served (displayed) in the last 90 days.	Network Custom Recommendations 1.0	✓
R - Custom Recommendations Details	Details for your custom recommendations. This includes information about your recommendations being served the most, accepted the most, or rejected the most.	Network Custom Recommendations 1.0	✓
R - Custom Recommendations L90D	Top custom recommendations over time. This includes details about how many of your custom recommendations were served, accepted (clicked), or rejected (dismissed) in the last 90 days.	Network Custom Recommendations 1.0	✓

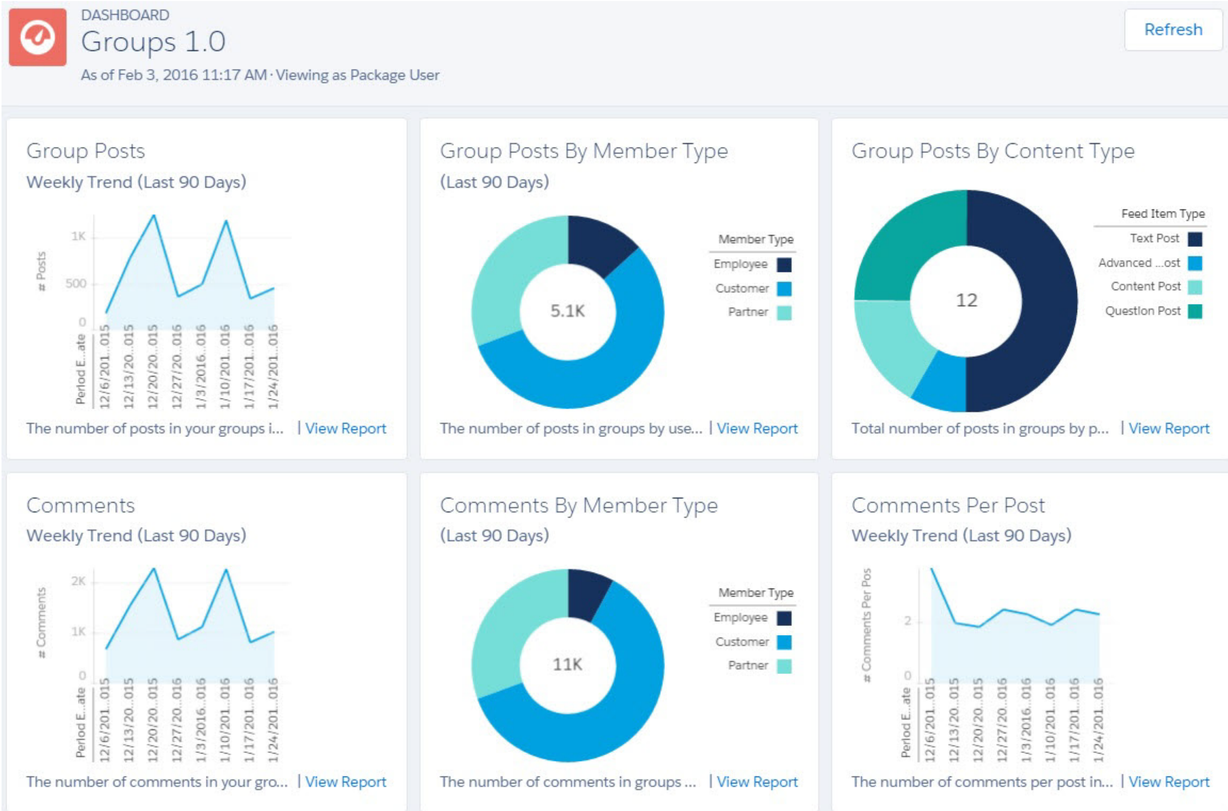
Groups Dashboard and Reports

Use the Groups dashboard to monitor feed and member activity in Chatter groups.

With this dashboard, you can answer:

- Which groups are most active?
- Which groups are growing the fastest?
- Who are the top contributors?
- How many posts and comments are there in groups?

Important: This dashboard and its reports are *only* available in the package with Chatter.



Report Name	Description	Custom Report Type	On Dashboard?
G - # Group Comments	Total number of comments in active groups.	Network Group Activity 3.0	
G - # Group Comments L30D	Total number of comments in active groups, in the last 30 days.	Network Group Activity 3.0	
G - # Group Comments Per Post	Total number of comments per post in groups, in the last 30 days.	Network Activity Daily Metrics 2.0	
G - # Group Comments Per Post L30D	Total number of comments per post in groups.	Network Activity Daily Metrics 2.0	
G - # Group Members	Total number of active members across all non-archived groups.	Network Group Members 2.0	
G - # Group Members Added L30D	Total number of active members added in the last 30 days across all non-archived groups.	Network Group Members 2.0	
G - # Group Posts	Total number of posts in active groups.	Network Group Activity 3.0	
G - # Group Posts L30D	Total number of posts in active groups, in the last 30 days.	Network Group Activity 3.0	

Report Name	Description	Custom Report Type	On Dashboard?
G - # Groups	Total number of groups.	Network Group Membership 2.0	
G - # Groups Added L30D	Total number of active groups created in the last 30 days.	Network Group Membership 2.0	
G - Active Groups L90D	Reports on groups with activity, such as posts and comments, in the last 90 days.	Network Group Activity 3.0	✓
G - Group Activity L90D	Trend on the number of posts and comments in your groups in the last 90 days.	Network Activity Daily Metrics 2.0	✓
G - Group Activity By User Type L90D	Reports on the number of contributions in groups by user type, such as partner, customer, or employee in the last 90 days.	Network Activity Daily Metrics 2.0	✓
G - Top 10 Groups By Contributions	Top groups by contributions.	Network Group Activity 3.0	✓
G - Top 10 Groups By Members	Top groups by members. Excludes members of archived groups and inactive users.	Network Group Activity 3.0	✓
Group Posts By Type	Posts in groups by post type.	Network Group Activity 3.0	✓

Members Dashboard and Reports

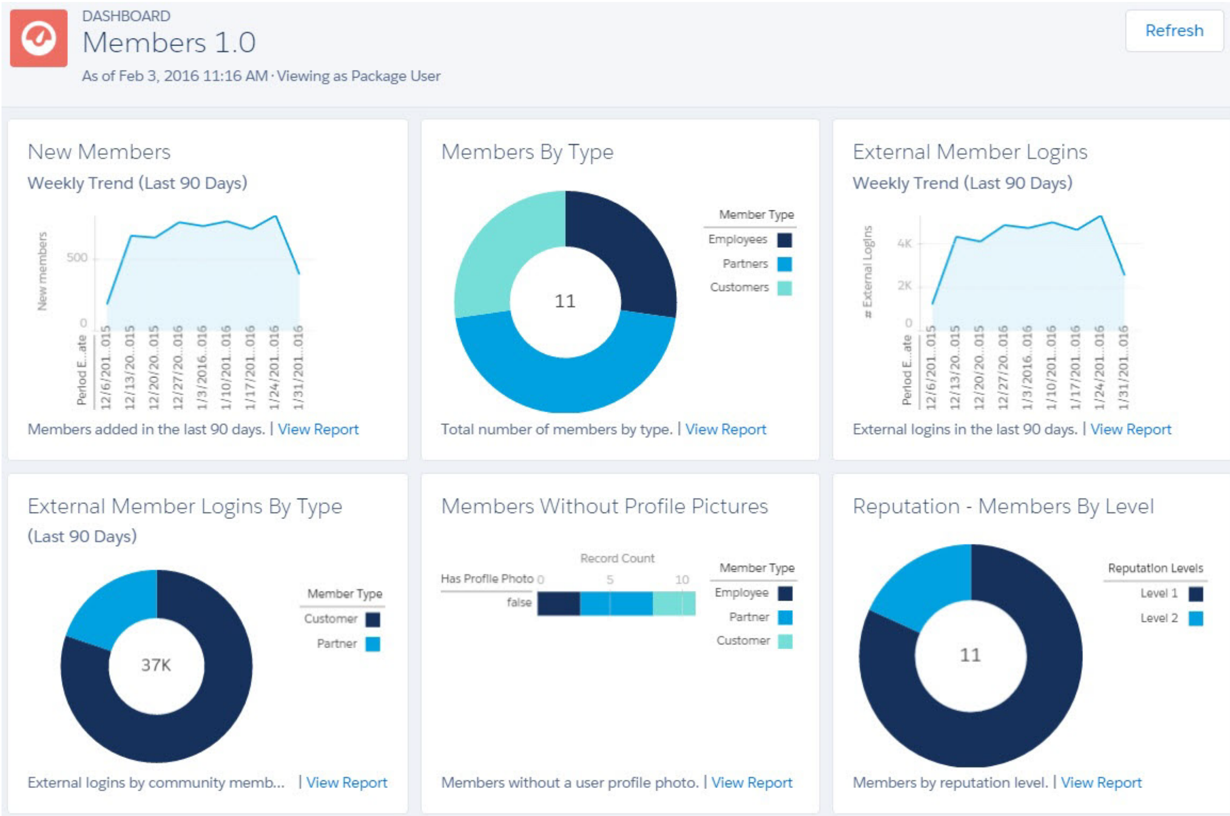
Use the Members dashboard to track community membership, new members added, and external member logins over time.

With this dashboard, you can answer:

- How many members are there and how many are new?
- Which members are logging in the most?
- Which new members are logging in the most?

Tip: If your community is not using the reputation feature, you can remove the reports and metrics associated with the feature.

Important: For information about the reports provided in the Members dashboard for the package without Chatter, refer to what's installed in your org.



Report Name	Description	Custom Report Type	On Dashboard?
M - # Member Logins L30D	Total number of members who logged in during the last 30 days.	Network Login History 5.0	
M - # Members	Total number of active members.	Network Members 2.0	
M - # Members Added L30D	Total number of active members added to the community in the last 30 days.	Network Members 2.0	
M - Members By Reputation Level	Total number of members by reputation level. To use this report, you must update the Reputation Level field and map it to your reputation levels and points.	Network Members 2.0	✓
M - Members With No Profile Photo	Reports on members without a user profile photo.	Network Members 2.0	✓
M - Top 10 Members By Reputation Points	Top 10 members with the highest reputation points.	Network Members 2.0	✓
Members by Type	Total number of members by type.	Network Members 2.0	✓

Report Name	Description	Custom Report Type	On Dashboard?
New Members (Last 90 Days Trend)	New members in the last 90 days.	Network Membership Daily Metrics 2.0	✓
New Member 1.0	Total number of new members added to the community in the last 7 days.	New Members	
O - External Logins L90D	External logins by community member type in the last 90 days.	Network Membership Daily Metrics 2.0	✓

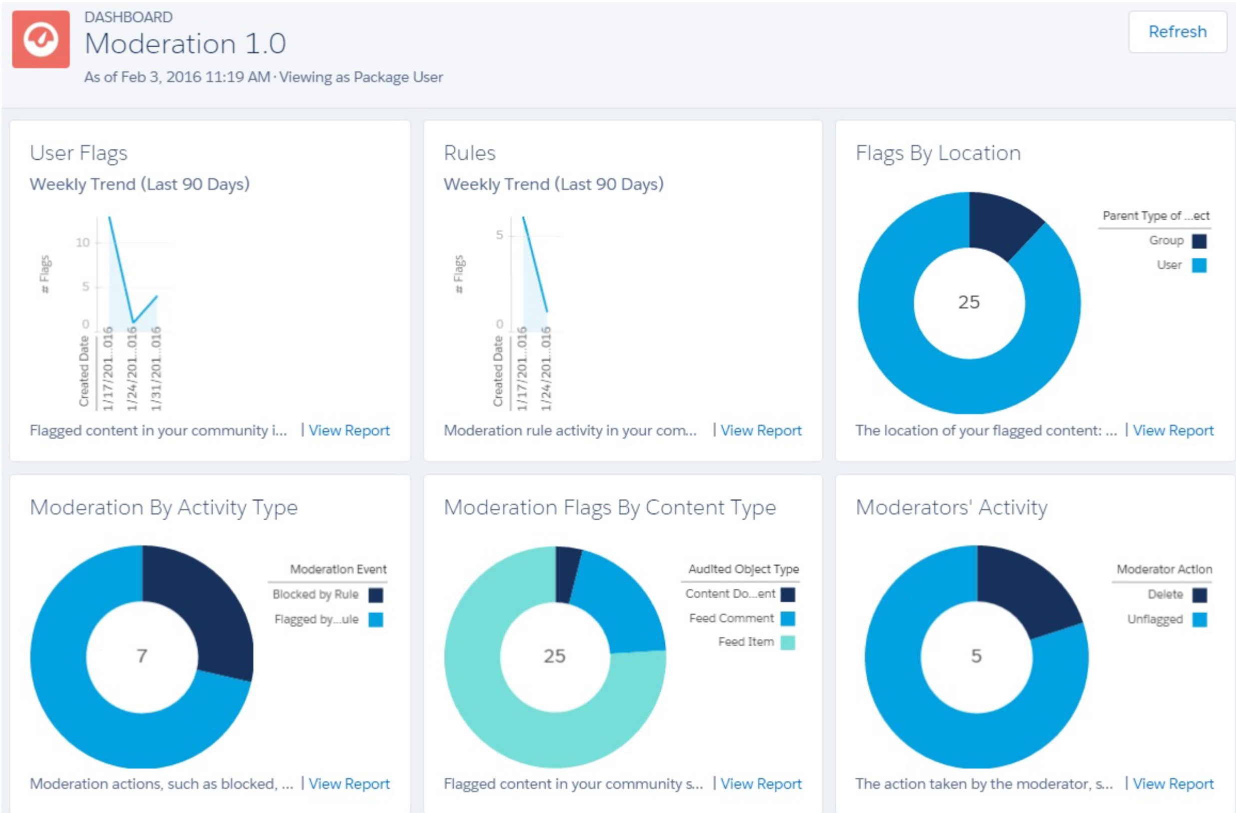
Moderation Dashboard and Reports

Use the Moderation dashboard to track community moderators' and members' flagging activity.

With this dashboard, you can answer:

- How many flags are there?
- Who is flagging content?
- Who is removing flags?
- How many private messages are being sent?

Important: This dashboard and its reports are *only* available in the package with Chatter.



Report Name	Description	Custom Report Type	On Dashboard?
MO - # Flagged Items Deleted	Total number of flagged items deleted by moderators.	Network Moderation 2.0	
MO - # Flags	Total number of flagged items.	Network Moderation 2.0	
MO - # Flags L30D	Total number of flagged items in the last 30 days.	Network Moderation 2.0	
MO - # Flags Removed	Total number of flags removed by moderators or users unflagging content.	Network Moderation 2.0	
MO - # Messages Sent	Total number of private messages sent in the community.	Network Private Messages 2.0	
MO - # Messages Sent L30D	Total number of private messages sent in the last 30 days in the community	Network Private Messages 2.0	
MO - Flags L90D	Trending report of flagged content in your community in the last 90 days.	Network Moderation 2.0	✓

Report Name	Description	Custom Report Type	On Dashboard?
MO - Flagged Item Location	Reports on the location of your flagged content, in user profiles or in groups.	Network Moderation 2.0	✓
MO - Flagged Item Type	Flagged content in your community sorted by object type, such as files, posts, comments, and private messages.	Network Moderation 2.0	✓
MO - Moderator Action	Reports on the action taken by the moderator, such as removing the flag on a post or deleting the flagged post.	Network Moderation 2.0	✓
MO - Rule Action	Reports on moderation actions, such as blocked, flagged, or replace.	Network Moderation 2.0	✓
MO - Rule Activity L90D	Trending report on moderation rule activity in your community in the last 90 days.	Network Moderation 2.0	✓
MO - Top 10 Message Senders L30D	Top 10 members sending the most private messages in the last 30 days.	Network Private Messages 2.0	

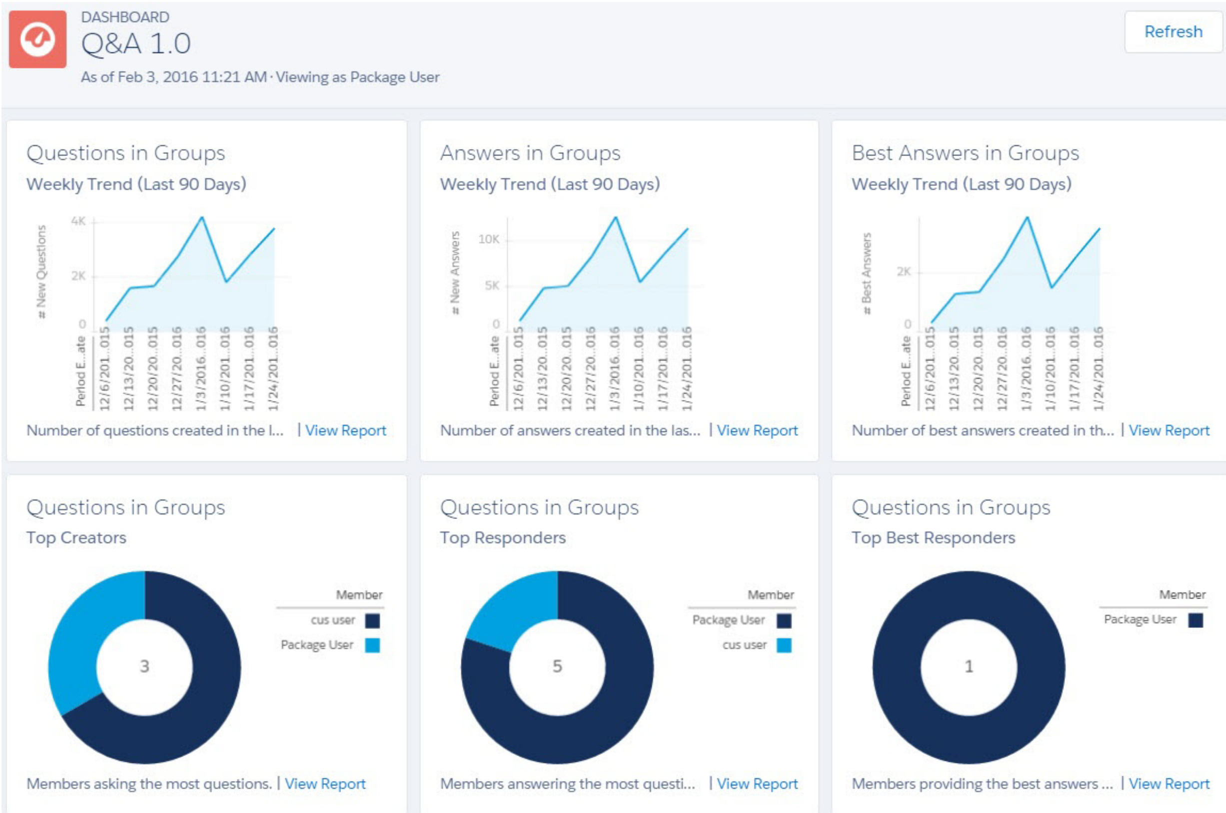
Q&A Dashboard and Reports

Use the Q & A dashboard to track recent activity for questions, answers, and best answers posted in groups

To track the same activity in user profiles, use the Self-Service Dashboard. With this dashboard you can answer:

- How many questions and answers are there per month?
- How many unanswered questions are there?
- How many questions without best answers are there?
- Who are the top question creators and question responders?
- How are questions and answers trending?

Important: This dashboard and its reports are *only* available in the package with Chatter.



Report Name	Description	Custom Report Type	On Dashboard?
Q - # Answers in Groups	Total number of answers in groups.	Network Group Activity 2.0	
Q - # Answers in Groups L30D	Total number of answers in groups in the last 30 days.	Network Group Activity 2.0	
Q - # Best Answers in Groups	Total number of best answers in groups.	Network Group Activity 2.0	
Q - # Questions in Groups	Total number of questions posted in groups.	Network Group Activity 2.0	
Q - # Questions in Groups L30D	Total number of questions posted in groups in the last 30 days.	Network Group Activity 2.0	
Q - # Unanswered Questions in Groups	Total number of unanswered questions in groups.	Network Group Activity 2.0	
Q - % Of Qs With Best Answers in Groups	Percentage of answered questions that have best answers in groups.	Network Group Activity 2.0	
Q - Answered Questions Groups L90D	Answered questions in groups in the last 90 days.	Network Group Activity 2.0	✓

Report Name	Description	Custom Report Type	On Dashboard?
Q - Answers in Groups L90D	Trend of answers in groups in the last 90 days.	Network Activity Daily Metrics 2.0	✔
Q - Best Answers in Groups L90D	Trend of best answers in groups in the last 90 days.	Network Activity Daily Metrics 2.0	✔
Q - Questions in Groups L90D	Trend of questions in groups in the last 90 days.	Network Activity Daily Metrics 2.0	✔
Q - Top 10 Best Q Responders in Groups	Top 10 users responding to questions with the best answers.	Network Group Activity 2.0	✔
Q - Top 10 Question Creators in Groups	Top 10 users with the most questions	Network Group Activity 2.0	✔
Q - Top 10 Question Responders in Groups	Top 10 users responding to questions	Network Group Activity 2.0	✔
Q - Unanswered Questions Groups L90D	Unanswered questions in groups in the last 90 days.	Network Group Activity 2.0	✔
Unanswered Questions	Number of unanswered questions.	New Members 1.0	

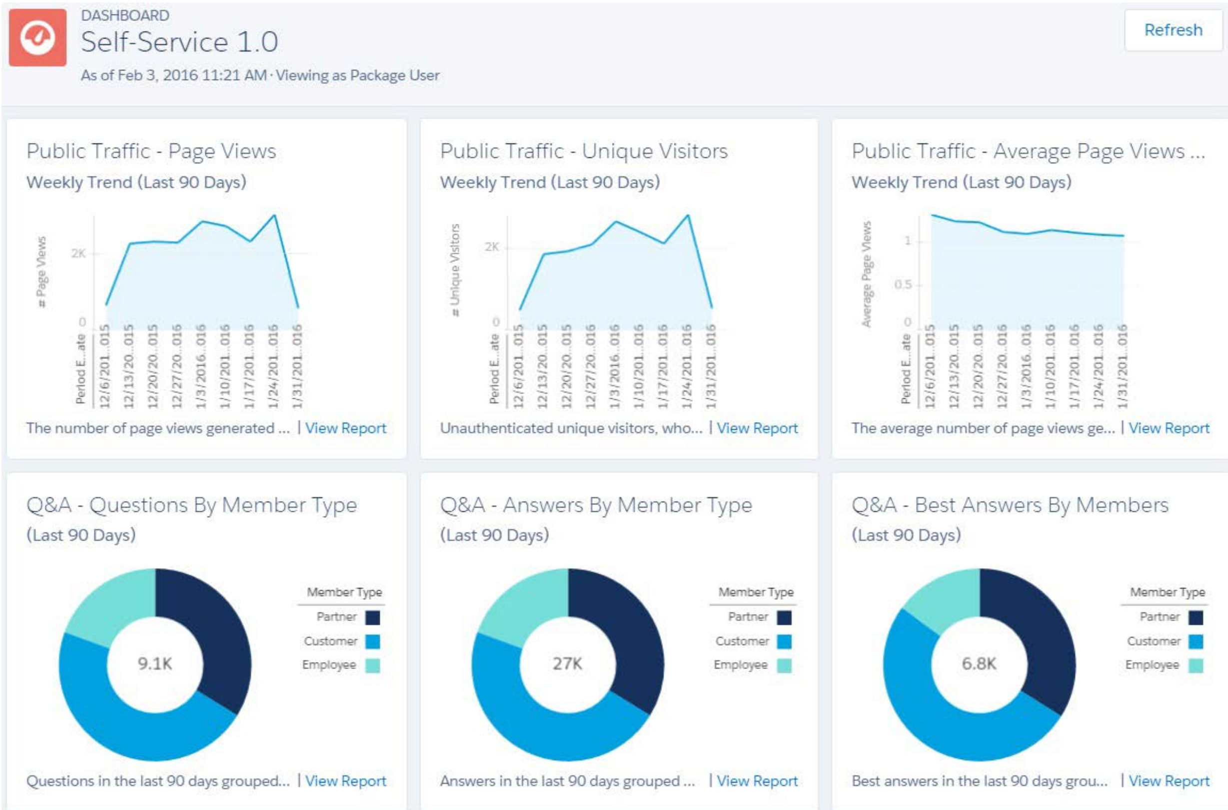
Self-Service Dashboard and Reports

The Self-Service dashboard tracks activity in the self-service template.

You can track recent activity for questions and answers posted on user profiles. To track the same activity in groups, use the Q&A Dashboard and Reports. With this dashboard you can answer:

- How many questions, unanswered questions, and answers there are in users profiles?
- How many daily page views and unauthenticated unique visitors does my community have?
- Who is creating and responding to questions?

Important: This dashboard and its reports are *only* available in the package with Chatter.



Report Name	Description	Custom Report Type	On Dashboard?
S - # Answers in User Profiles	Total number of answers in user profiles.	Network User Activity 2.0	
S - # Answers in User Profiles L30D	Total number of answers in the last 30 days in user profiles.	Network User Activity 2.0	
S - # Average Page Views per UV	Average number of page views per unique visitor.	Network Public Usage Daily Metrics 2.0	
S - # Best Answers in User Profiles	Total number of best answers in user profiles.	Network User Activity 2.0	
S - # Page Views L30D	Total number of page views in the last 30 days.	Network Public Usage Daily Metrics 2.0	
S - # Questions in User Profiles	Total number of questions posted in user profiles.	Network User Activity 2.0	
S - # Questions in User Profiles L30D	Total number of questions posted in the last 30 days in user profiles.	Network User Activity 2.0	

Report Name	Description	Custom Report Type	On Dashboard?
S - # Unanswered Qs in User Profiles	Total number of unanswered questions in user profiles.	Network User Activity 2.0	
S - % Of Qs With Best Answer User Profile	Percentage of answered questions that have best answers in user profiles.	Network User Activity 2.0	
S - Answers By User Type L90D	Answers in the last 90 days grouped by user type, such as partner, customer, or employee.	Network Activity Daily Metrics 2.0	✓
S - Answers in User Profiles L90D	Answers in the last 90 days.	Network Activity Daily Metrics 2.0	✓
S - Avg Page Views By Visitors L90D	Reports on the average page views generated by visitors for the last 90 days.	Network Public Usage Daily Metrics 2.0	✓
S - Best Answers By User Type L90D	Best answers in the last 90 days grouped by user type, such as partner, customer, or employee.	Network Activity Daily Metrics 2.0	✓
S - Best Answers in User Profiles L90D	Best answers in the last 90 days.	Network Activity Daily Metrics 2.0	✓
S - Page Views L90D	Reports on the number of page views generated by guest users for the last 90 days in your self-service community. Note: The number of page views might not match other analytics tools, as all tools use different methods for counting page views.	Network Public Usage Daily Metrics 2.0	✓
S - Questions By User Type L90D	Questions in the last 90 days grouped by user type, such as partner, customer, or employee.	Network Activity Daily Metrics 2.0	✓
S - Questions in User Profiles L90D	Questions in the last 90 days.	Network Activity Daily Metrics 2.0	✓
S - Top 10 Best Q Respd in User Profiles	Top 10 users responding to questions with the best answer.	Network User Activity 2.0	
S - Top 10 Q Creators in User Profiles	Top 10 users with the most questions.	Network User Activity 2.0	
S - Top 10 Q Responders in User Profiles	Top 10 users responding to questions.	Network User Activity 2.0	
S - Unique Visitors L90D	Reports on unauthenticated unique visitors, who visited the site at least once that week, in the last 90 days in your self-service community. This includes visitors accessing the login and logout pages.	Network Public Usage Daily Metrics 2.0	✓

Question Response Time Dashboard and Reports

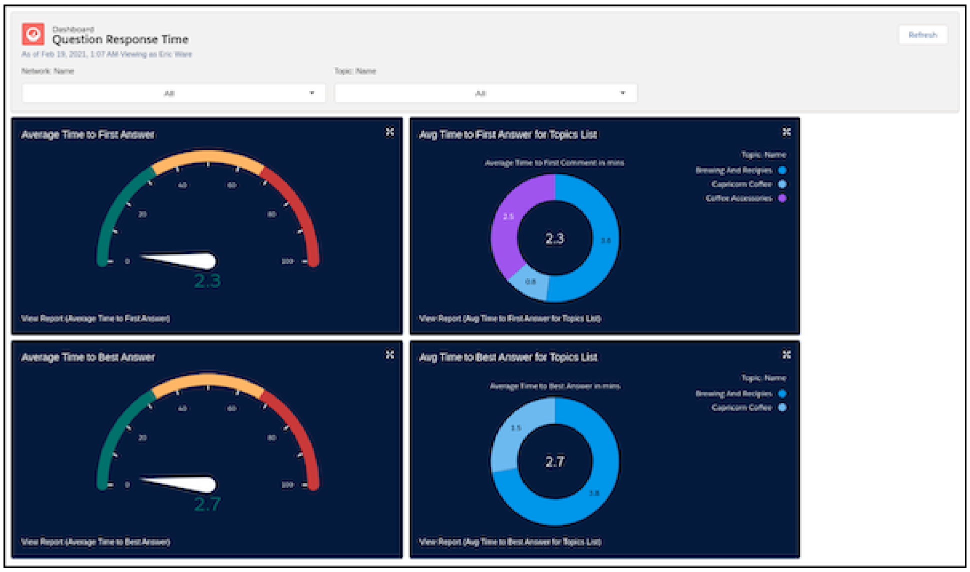
Use the Question Response Time dashboard and reports to determine how long it takes for questions to get a response.

The Question Response Time dashboard answers questions like:

- How long does it take for questions to get a first answer?
- How long does it take for questions to get a best answer?

These metrics can be retrieved for any list of groups or topics.

Important: This dashboard and its reports are *only* available in the package with Chatter.



Report Name	Description	Custom Report Type	On Dashboard?
Average Time to First Answer	Average length of time it takes for a question post to get a first answer.	NetworkFeedResponseMetric	✓
Average Time to Best Answer	Average length of time it takes for a question post to get a best answer.	NetworkFeedResponseMetric	✓
Avg Time to First Answer for Topics List	Average length of time it takes for a question post to get a first answer in a list of topics.	NetworkFeedResponseMetric	✓
Avg Time to Best Answer for Topics List	Average length of time it takes for a question post to get a best answer in a list of topics.	NetworkFeedResponseMetric	✓

Topics Dashboard and Reports

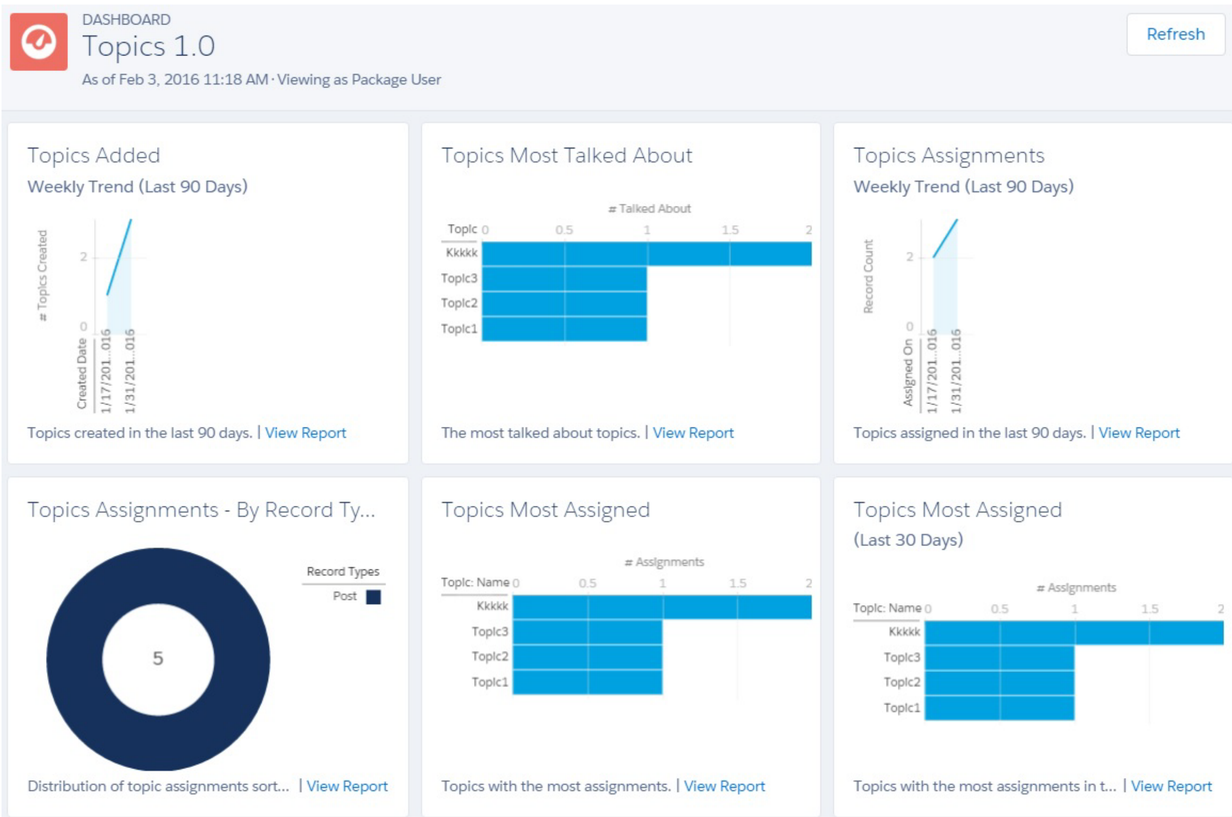
Use the Topics dashboard to track your community topics.

With this dashboard, you can see:

- How are topics trending?
- How many topics are getting assigned?
- Who's assigning topics?

- Which topics are being talked about?

Important: This dashboard and its reports are *only* available in the package with Chatter.



Report Name	Description	Custom Report Type	On Dashboard?
T - # Topics	Total number of topics.	Network Topics 2.0	
T - # Topics Added L30D	Total number of topics added in the last 30 days.	Network Topics 2.0	
T - # Topics Assigned	Total number of topics assigned.	Network Topic Assignments 3.0	
T - # Topics Assigned L30D	Total number of topics assigned in the last 30 days.	Network Topic Assignments 3.0	
T - Top 10 Topic Assigners	Top 10 users with the largest number of topics assigned.	Network Topic Assignments 3.0	✓
T - Top 10 Topic Assigners L30D	Top 10 users with the largest number of topics assigned in the last 30 days.	Network Topic Assignments 3.0	✓
T - Top 10 Topics By Assignment	Top 10 topics with the most assignments.	Network Topic Assignments 3.0	✓

Report Name	Description	Custom Report Type	On Dashboard?
T - Top 10 Topics By Assignment L30D	Top 10 topics with the most assignments in the last 30 days.	Network Topic Assignments 3.0	✓
T - Top 10 Trending Topics	Top 10 topics with the largest number of "Talking About" indicators.	Network Topics 2.0	✓
T - Topics Assignments By Record Type	Distribution of topic assignments sorted by the Record Types field (unmapped record types show as Other). Note: You can create values for the Record Types field to map custom objects or other types that are not predefined.	Network Topic Assignments 3.0	✓
T - Topics Assigned L90D	Reports on the number of topics assigned in the last 90 days.	Network Topic Assignments 3.0	✓
T - Topics Created L90D	Trending report on the number of topics created in the last 90 days.	Network Topics 2.0	✓

Misc Communities Reports

The reports provided in this folder are feature-dependent or require special user permissions. You can add these reports to Insights folders or dashboards in Experience Management or Experience Workspaces. These reports are provided in the **Misc Communities Reports** folder.

Report Name	Description	Requires	Custom Report Type
Cases	Total number of questions that escalated to cases in the last 30 days. Tip: You can use this report on your Home Dashboards.	Org preference - Enable Question-to-Case in Communities	Network Cases 1.0
Community CDN Usage Report	Displays the community's content delivery network (CDN) consumption by domain.		CDN Usage
Escalated To Case	Questions that have been escalated to cases. Tip: We recommend that you add this report to the **Insights Self-Service** folder so you can view this report in Community Management or Experience Workspaces.	Org preference - Enable Question-to-Case in Communities	Network Cases 1.0

Report Name	Description	Requires	Custom Report Type
Escalated To Case Closed	Questions that have been escalated to cases and closed in the last 7 days. Tip: We recommend that you add this report to the **Insights Self-Service** folder so you can view this report in Community Management or Experience Workspaces.	Org preference - Enable Question-to-Case in Communities	Network Cases 1.0
Messages From New Members	Private messages sent by external users in the last 7 days. This report only includes messages sent by external users who registered in the last 7 days. Tip: We recommend that you add this report to the **Moderation Audit Trail** folder so you can view this report in Community Management or Experience Workspaces.	Org preference - Enable Private Messages User permission - “Manage Chatter Messages” Important: You need this user permission to see the report in your org.	Network Private Messages 3.0
Questions Escalated - Monthly Trend	Monthly trending report on questions escalated to cases in your community. Tip: You can use this report on your Community Management Home dashboard or in Experience Workspacesunder **Dashboards** > **Home**.	Org preference - Enable Question-to-Case in Communities	Network Cases 1.0
Questions Escalated - Weekly Trend	Weekly trending report on the number of questions escalated to cases in your community in the last 90 days. Tip: You can use this report on your Community Management Home dashboard or in Experience Workspaces under **Dashboards** > **Home**.	Org preference - Enable Question-to-Case in Communities	Network Cases 1.0
Related Questions CTR	The click-through rate for the Related Questions (RQ) widget, which is the ratio of the number of times a user clicked on the RQ widget compared to the number of times the widget was shown	Related Questions CTR 1.0	

Salesforce Org Dashboard and Report Descriptions

You must view the Chatter and Licenses dashboards and reports from your internal Salesforce org.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

IN THIS SECTION:

Chatter Dashboard and Report

Use the Chatter dashboards and reports to track Chatter usage in your internal Salesforce org.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Internal Salesforce Org

You must view these dashboards and reports from your internal Salesforce org. If you previously installed the Salesforce Chatter Dashboards package, you must uninstall that package and use the reports and dashboards provided here instead. You can find these reports and dashboards in the **Chatter Reports** and **Chatter Dashboards** folders.

Important: These dashboard and reports are *only* available in the package with Chatter.

Warning: If you customize these Chatter reports and remove the Networks filter, they will report on Chatter usage across your entire Salesforce org, including usage from your internal org and your communities. If you view these Chatter dashboards or reports from within Community Management or Experience Workspaces, only community-specific data is displayed. To create a report that returns data only from your internal org, use the Network: Name less than ! filter.

For detailed information about the Chatter dashboards, reports, and custom report types, see Get Started with Chatter Dashboards. The following components are provided in the Chatter Dashboards package:

- Chatter Overview dashboard and reports
- Chatter Adoption by Department dashboard and reports
- Chatter Files dashboard and reports
- Chatter Groups dashboard and reports
- Chatter Management dashboard and reports
- Chatter Q&A dashboard and reports
- Chatter Topics dashboard and reports
- Chatter User dashboard and reports
- Chatter Custom Report Types
- Chatter Edits reports

License Usage Dashboard and Reports

Use the License Usage 1.0 dashboard to track usage of login-based and named-user licenses so you can optimize license usage and plan for growth.

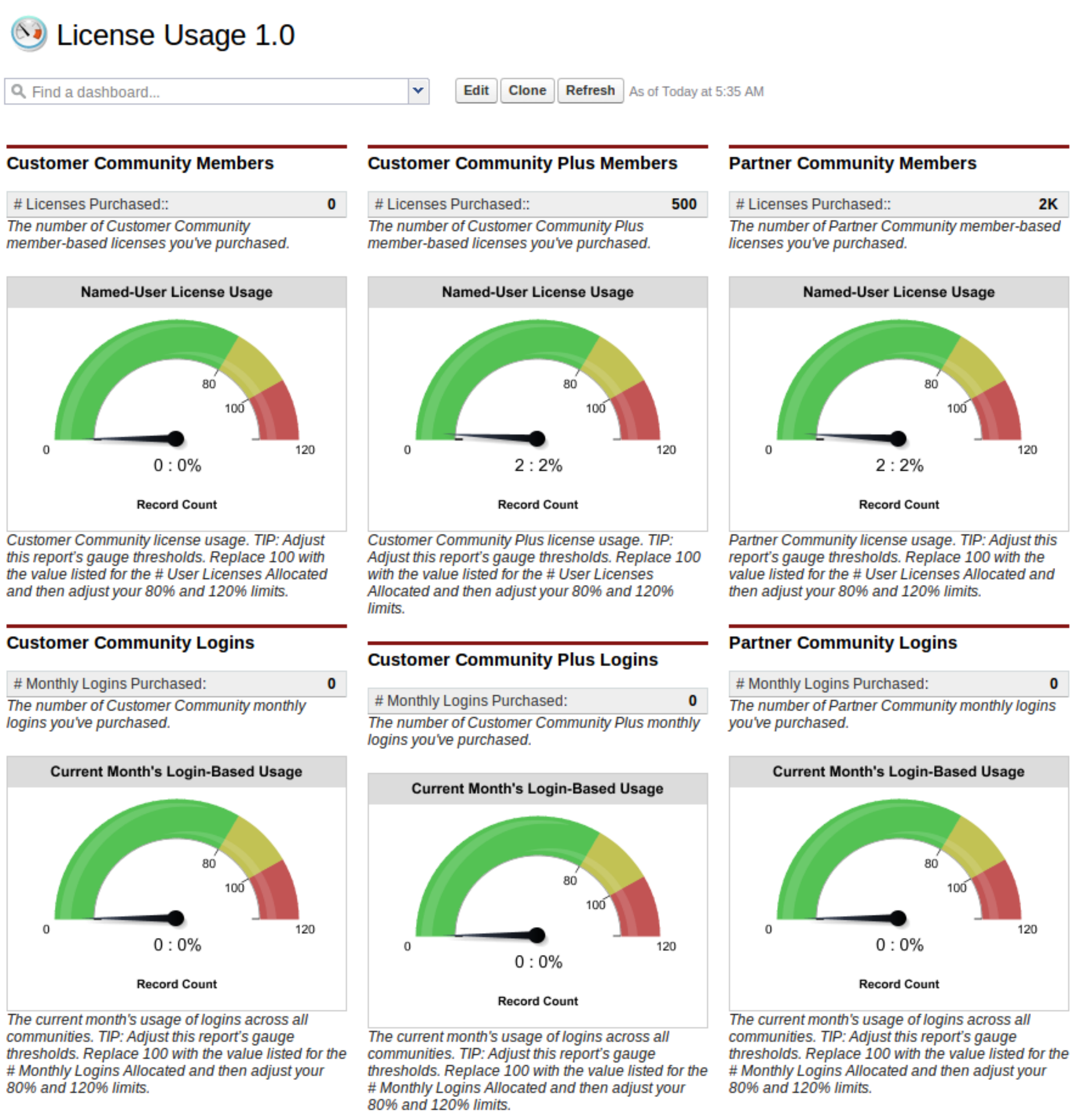
With this dashboard, you can see:

- If you need to adjust your allocated license usage
- Monthly and daily tracking of your license usage
- Predict and stop possible overages based on monthly trends

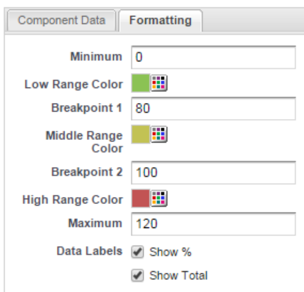
The reports in this dashboard only track community licenses. To track portal licenses, clone the reports and update the license filter.

You can find these reports and dashboards in the **Communities Reports** and **Communities Dashboards** folders.

Important: View this dashboard only from your internal Salesforce org's Dashboards tab. Viewing this dashboard in Community Management or Experience Workspaces displays incorrect data as the license metrics become community- specific and not org-wide. For this reason, we recommend that you don't map this dashboard in Community Management or Experience Workspaces



Note: Customize gauge reports to provide relevant ranges based on your actual number of licenses. To edit the dashboard click **Edit Attributes** on the report you want to customize. For Breakpoint 2 (set by default to 100), enter your number of allocated licenses. For Breakpoint 1 (set by default to 80), enter 80% of your allocated licenses. For Maximum (set by default to 120), enter 120% of your allocated licenses. You can also change the breakpoints to any percentage you want. For example, if you have 50 licenses, you would change 80 to 40, 100 to 50, and 120 to 60.



Report Name	Description	Custom Report Type	Package with Chatter	Package without Chatter
L - CC Login-based - Monthly Logins 2.0	Monthly number of logins for users with a Customer Community login-based license in descending order.	Network Login History 5.0	✓	✓
L - CC User-based - Monthly Logins 2.0	Monthly number of logins for users with a Customer Community user-based license in descending order.	Network Login History 5.0	✓	✓
L - # Cust Comm All Active Lic 2.0	Number of active members on a Customer Community license across all communities.	Network Login History 5.0	✓	✓
L - # Cust Comm All Allocated Lic 2.0	Number of Customer Community licenses allocated in this Salesforce org across all communities.	Network Login History 5.0	✓	✓
L - # Cust Comm Login Members	Number of community members created with the Customer Community login-based license. (The Network Tenant Usage Entitlement custom report type is no longer supported in this package. Use the Cust Comm Login Members report to get a detailed report of usage.)	Network Login History 5.0	✓	✓
L - # Cust Comm Logins All Alloct 2.0	Number of monthly logins allocated for the Customer Community login-based license in this Salesforce org across all communities.	Network Login History 5.0	✓	✓
L - CCP Login-based - Monthly Logins 1.0	Monthly number of logins for user with a Customer Community Plus user-based license in descending order.	Network Login History 5.0	✓	✓
L - CCP User-based - Monthly Logins 2.0	Monthly number of logins for users with a Customer Community Plus user-based license in descending order.	Network Login History 5.0	✓	✓

Report Name	Description	Custom Report Type	Package with Chatter	Package without Chatter
L - # Cust Comm Plus All Active Lic	Number of active members on a Customer Community Plus license across all communities.	Network Login History 5.0	✓	✓
L - # Cust Comm Plus All Alloct Lic 2.0	Number of Customer Community Plus licenses allocated in this Salesforce org across all communities.	Network Login History 5.0	✓	✓
L - # Cust Comm Plus Login Members	Number of community members created with the Customer Community Plus login-based license.	Network Login History 5.0	✓	✓
L - # Cust Comm Plus Logins All Alloct 2.0	Number of monthly logins allocated for the Customer Community Plus login-based license in this Salesforce org across all communities.	Network Login History 5.0	✓	✓
L - # Partner Comm All Active Lic	Number of active members on a Partner Community license across all communities.	Network Login History 5.0	✓	✓
L - # Partner Comm All Allocated Lic 2.0	Number of Partner Community licenses allocated in this Salesforce org across all communities.	Network Login History 5.0	✓	✓
L - # Partner Comm Logins All Alloct 2.0	Number of monthly logins allocated for the Partner Community login-based license in this Salesforce org across all communities.	Network Login History 5.0	✓	✓
L - # Partner Comm Login Members	Number of community members created with the Partner Community login-based license.	Network Login History 5.0	✓	✓
L - Cust Comm License Usage	Customer Community user license usage across all communities. This report counts the number of users created with a Customer Community license.	Network Login History 5.0	✓	✓
L - Cust Comm Login Monthly Trend 2.0	Monthly trend of Customer Community logins compared to your allocation.	Network Login History 5.0	✓	✓
L - Cust Comm Login Monthly Usage 2.0	The current month's usage of Customer Community logins compared to your monthly allocation. Important: To use this report, you must specify your license limits.	Network Login History 5.0	✓	✓
L - Cust Comm Plus License Usage	Customer Community Plus user license usage across all communities. This report counts the number of users created with a Customer Community Plus license. Important: To use this report, you must specify your license limits.	Network Login History 5.0	✓	✓
L - Cust Comm Plus Login Monthly Trend 2.0	Monthly trend of Customer Community Plus logins compared to your allocation.	Network Login History 5.0	✓	✓

Report Name	Description	Custom Report Type	Package with Chatter	Package without Chatter
L - Cust Comm Plus Login Monthly Usage 2.0	The current month's usage of Customer Community Plus logins compared to your monthly allocation. **Important:** To use this report, you must specify your license limits.	Network Login History 5.0	✓	✓
L - Member Distribution By License Type	The distribution of members by license type: member-based or login-based.	Network Login History 5.0	✓	✓
L - Partner Comm License Usage	Partner Community user license usage across all communities. This report counts the number of users created with a Partner Community license. **Important:** To use this report, you must specify your license limits.	Network Login History 5.0	✓	✓
L - Partner Comm Login Monthly Trend 2.0	Monthly trend of Partner Community logins compared to your allocation.	Network Login History 5.0	✓	✓
L - Partner Comm Login Monthly Usage 2.0	The current month's usage of Partner Community logins compared to your monthly allocation. **Important:** To use this report, you must specify your license limits.	Network Login History 5.0	✓	✓
L - PC Login-based - Monthly Logins 1.0	Monthly number of logins for users with a Partner Community login-based license in descending order.	Network Login History 5.0	✓	✓
L - PC User-based - Monthly Logins 1.0	Monthly number of logins for users with a partner Community user-based license in descending order.	Network Login History 5.0	✓	✓
L - Public Page Views - Monthly Trend	Monthly trending report on the daily page views generated by guest users in your community.	Network Login History 5.0	✓	✓
L - Yearly Public Page Views	Yearly report on the daily page views generated by guest users in your community.	Network Login History 5.0	✓	✓

Custom Report Type Descriptions

EDITIONS

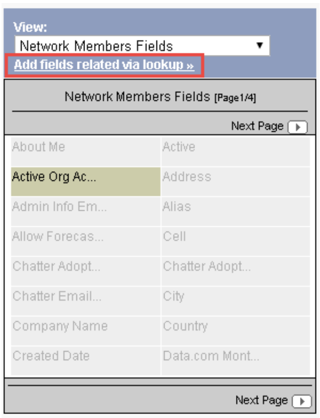
Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

The reports in this package are based on a set of communities-focused custom report types, which you can customize to enhance reporting capabilities with more fields.

Tip: Items in custom report types that reference a user or member, such as Created By, contain the following user lookup fields: LastLoginDate, Department, Country, Role, and Profile. You can specify these additional fields to display in your report by editing the custom report type from Setup. Open the custom report type details, click **Edit Layout**, and then click **Add fields related via lookup**.

The Network Members object includes member lookup fields. With access to this detail, you can repurpose member reports to report on other things such as accounts. For example, you can make a copy of a member report and then add the User.Account field through the Network Members lookup fields. This approach allows you to use the Top 10 Members By Contribution report to create a new report called Top 10 Accounts by Contributor report. You can customize reports to provide data on the top active and inactive accounts based on the number of logins over a specific time range.



Note: Currently, you can't report on the number of accounts by type. Also, the following custom report types don't track internal users who log in to a community from their internal Salesforce org.

Custom Report Type Name	Description	Package with Chatter	Package without Chatter
CDN Usage	Provides the amount of content delivery network (CDN) usage consumed by an org, listed by domain.	✓	✓
Chatter Activity 1.0	Provides information on Chatter user activity such as, posts, comments, and likes. The user metrics are calculated against the user activity on groups and user profiles in your organization.	✓	
Chatter Activity Daily Metrics 1.0	Provides daily trending metrics on posts and comments created in groups and user profiles in your organization. Reports based on this custom report type get data from system jobs.	✓	
Chatter Edits 1.0	Provides information on Chatter edits.	✓	

Custom Report Type Name	Description	Package with Chatter	Package without Chatter
Chatter Group Members 1.0	Provides information on groups and their members, such as the date a member joined the group.	✓	
Chatter Groups Activity 1.0	Provides information on group activity, such as posts, comments, and likes, and group contributors. Use this custom report type to report on overall group activity, by member type and by feed item type (for example: post or question poll).	✓	
Chatter Knowledgeable Users 1.0	Provides information on knowledgeable users in your organization.	✓	
Chatter Topic Assignments 1.0	Provides information on topic assignments. Use this custom report type to report on the number of assignments, your top assigners, and assignments by object types. You can also use it to find topics with the most assignments.	✓	
Chatter Topics 1.0	Provides information on trending topics, topic assigners, and more.	✓	
Chatter Unique Contributor Daily Metrics 1.0	Provides information on daily unique visitors across groups and user profiles in your organization.	✓	
Chatter User Activity 1.0	Provides information on user profiles such as posts, comments, and likes, and profile contributors. Use this custom report type to report on overall user profile activity, by member type and by feed item type (for example, post or question poll).	✓	
Community Searches 2.0	Provides information about community's search behavior.	✓	✓
File and Content Report	Use this standard report type to track file adoption and engagement for Chatter in your internal Salesforce org or in communities. You can also track file properties (such as file version and size), file uploads, downloads, shares, links, link views, and who uploaded the content.	✓	
Network Activity Audit 1.0	Provides information about flagging and moderation activity in a community.	✓	
Network Activity Daily Metrics 2.0	Provides information for chatter activity on profiles and groups by internal, customer, and partner member types. Reports based on this custom report type get data from system jobs.	✓	
Network Cases 1.0	Provides information about cases in your Salesforce org.	✓	
Network Chatter Edits 1.0	Provides information on Chatter edits in the community.	✓	
Network Comments Pending Approval 1.0	Provides information about your community's feed comments that are pending approval.	✓	
Network Custom Recommendations 1.0	Provides information about the custom recommendations and channels in your community including; details about the	✓	✓

Custom Report Type Name	Description	Package with Chatter	Package without Chatter
	acceptance rate, rejection rate, and number of times a recommendation was served.		
Network Feed Activity	Provides information about the activity in your community’s feed, including questions and answers.	✓	✓
Network Group Membership 3.0	Provides information on groups and their members, such as the date a member joined the group and the member type (internal, customer, or partner).	✓	
Network Groups Activity 3.0	Provides information on group activity (posts, comments, and likes) and group contributors. Use this custom report type to report on overall group activity, by member type and by feed item type (for example: post or question poll).	✓	
Network Groups Q & A Activity 1.0	Provides information about your community groups' question and answer activities.	✓	
Network Login History 5.0	Provides detailed metrics about the external users (partners or customers) logging into a community. This custom report type doesn’t include logins for internal users accessing the community from their internal Salesforce org. (The Network Tenant Usage Entitlement custom report type is no longer supported in this package. Lookup Network > Network Members > Login History from the Network Login History 5.0 custom report type to get a detailed report of usage)	✓	✓
Network Member Activity 1.0	Provides high-level metrics about community member adoption and engagement.	✓	
Network Members 3.0	Provides information on community members. The Network Members entity exposes all user record fields.	✓	✓
Network Membership Daily Metrics 2.0	Provides the number of internal and external members.	✓	✓
Network Frozen Members 2.0	Provides information about all your community's frozen members. Reports based on this custom report type get data from system jobs.	✓	
Network Moderation Flagged Direct Messages 1.0	Provides information about all of your community's direct messages which have been flagged by the users.	✓	
Network Moderation Flagged Comments 2.0	Provides information about all your community's feed comments which are flagged by the users.	✓	
Network Moderation Flagged Files 2.0	Provides information about all your community's files which are flagged by the users.	✓	
Network Moderation Flagged Messages 2.0	Provides information about all your community's Chatter messages which are flagged by the users.	✓	

Custom Report Type Name	Description	Package with Chatter	Package without Chatter
Note: This report has been enhanced for this version			
Network Moderation Flagged Posts 2.0	Provides information about all your community's feed posts which are flagged by the users.	✔	
Network Posts Pending Approval 2.0	Provides information about all your community's feeds posts which are pending approval.	✔	
Network Private Messages 3.0	Provides information on private messages sent in a community, including who sent them.	✔	
Network Public Usage Daily Metrics 2.0	Provides information on daily public page views by guest users. Reports based on this custom report type get data from system jobs. Guest users are assigned a random identifier that is used to generate the daily report and then discarded.	✔	✔
Network Topic Assignments 3.0	Provides information on topic assignments in a community. Use this custom report type to report on the number of assignments, your top assigners, and assignments by object types. You can also use it to find topics with the most assignments.	✔	
Network Topics 3.0	Provides information on trending topics, topic assignments, topic assigners, and more.	✔	
Network Unique Contributor Daily Metrics 2.0	Provides information on daily unique visitors across groups and user profiles, by member type (internal, customer, and partner). Reports based on this custom report type get data from system jobs.	✔	
Network User Activity 3.0	Provides information on user profile activity (such as posts, comments, and likes) and profile contributors. Use this custom report type to report on overall user profile activity, by member type and by feed item type (for example, post or question poll).	✔	
Network User Licenses 1.0	Provides information about community user license usage. The Usage Entitlement is a license bucket that includes Customer Community Logins, Customer Community Members, Partner Community Logins, and Partner Community Members (tracking both community and portal licenses assigned to the community). The Customer Community Members and Partner Community Members bucket fields track name-based users per community. The Customer Community Logins and Partner Community Logins bucket fields track login-based users across communities.	✔	✔

Custom Report Type Name	Description	Package with Chatter	Package without Chatter
	The Amount Used field indicates how many licenses were used that week. The Amount Allowed field indicates how many licenses the customer purchased (either named-users or logins per month).		
Network User Participation Daily Metrics	Provides information about whether a user is a contributor or an observer in a community. Reports based on this custom report type get data from system jobs.	✓	
Related Questions CTR 1.0	Provides information about the number of times a user clicks on the Related Questions widget compared to the number of times it is shown.		

The Power of Customization

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

The dashboard and reports provided in the package are a great start, but they may not be exactly what your community needs. With a few simple steps, you can customize the provided dashboards and reports to suit your needs. To customize a report, open the **Reports** tab and click the report name you want to modify, then click **Customize**.

IN THIS SECTION:

Customize the Date Filter

For reports that specify a date filter, you can customize these reports to provide any date range.

Add or Remove Columns from Reports

If a report includes a column that isn't useful to you, remove it. If you want more data displayed, add another column. To add a column, double-click the additional field from the Fields pane, and reorder the columns if you want to. To remove a column, click the column and select **Remove Column**.

Change the Grouping of a Report

You can change the report grouping to better fit your community or internal Salesforce org.

Add More Filter Logic

You can add more filters to a report. For example, you can filter a report to only show external users or a subset of groups.

Report on New Data

You can also report on new data by adding custom lookup fields to the custom report types.

Customize the Date Filter

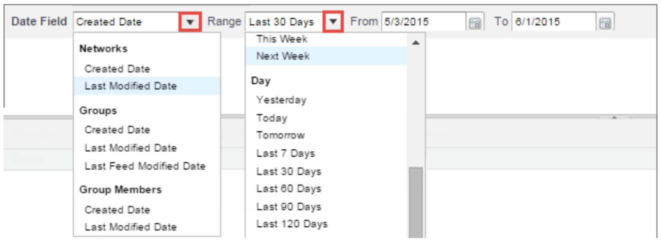
For reports that specify a date filter, you can customize these reports to provide any date range.

You can also change the **Date Field** to report on other objects in the report. Try customizing the G- # Group Members Added L30D report.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions



For more information, see Filter Report Data, Notes about Filtering on Types of Fields and Values, and Relative Date Filter Reference.

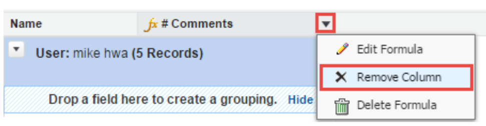
Add or Remove Columns from Reports

If a report includes a column that isn't useful to you, remove it. If you want more data displayed, add another column. To add a column, double-click the additional field from the Fields pane, and reorder the columns if you want to. To remove a column, click the column and select **Remove Column**.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions



For more information, see Report Fields in Salesforce Help.

Change the Grouping of a Report

You can change the report grouping to better fit your community or internal Salesforce org.

For example, if a report is grouped by department, you can group by country instead. Try customizing the CH D - Group Membership By Dept report.

1. In the Fields pane, drag the new field you want to group by into the Preview pane area that says **Drop a field here to create a grouping**.
2. In the Preview pane, click the old grouping field and select **Remove Group**.
3. On your new grouping field, click the dropdown and select **Sort Group By** and select the relevant data you want to sort by.

For more information, see Group Your Report Data.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

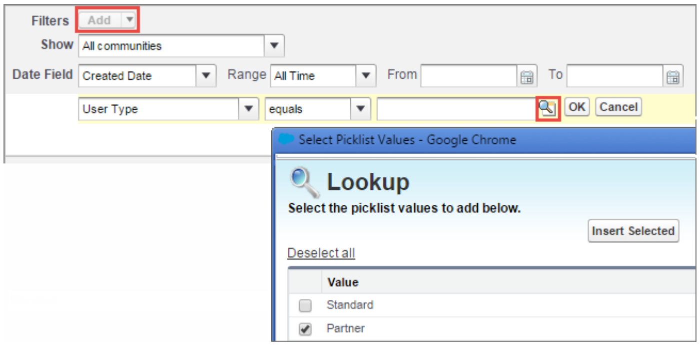
Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Add More Filter Logic

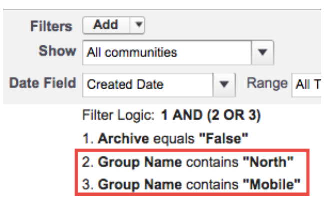
You can add more filters to a report. For example, you can filter a report to only show external users or a subset of groups.

To add a filter, click **Add** and then specify the field.

Adding a User Type filter:



Added Group filter:



For more information, see Add Filter Logic and Filter Your Report Data in Salesforce Help.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Report on New Data

You can also report on new data by adding custom lookup fields to the custom report types.

This type of customization is useful if you want to expose more user fields or custom fields that you've added to contacts. See the Custom Report Type Descriptions section for more information.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Community Case Deflection Metrics Dashboard and Reports

Install the Salesforce Case Deflection Reporting Package to see how well the Contact Support Form and Case Deflection components actually deflect cases from being created. Using the Community Case Deflection Metrics dashboard, get real-time metrics on potential and confirmed case deflections, the most helpful articles and discussions, and the least helpful articles and discussions.

During installation, dashboard and report folders are automatically installed in your internal org. If you have no previous dashboards mapped in Community Management or Experience Workspaces, they are automatically mapped for you during installation.

After the package is installed, you can access your new dashboards and reports alongside all your other Salesforce dashboards and reports. When you view the dashboards in Community Management or Experience Workspaces, community-specific data is displayed.

With this dashboard, you can answer:

- How many confirmed, potential, and unsuccessful deflections are in my community?
- Which articles are the most helpful for deflecting cases?
- Which discussions are the most helpful for deflecting cases?

Important: This dashboard and its reports are *only* available in orgs using Salesforce Knowledge. The reports show data from the previous 30 days, and the system keeps the data for 30 days.

EDITIONS

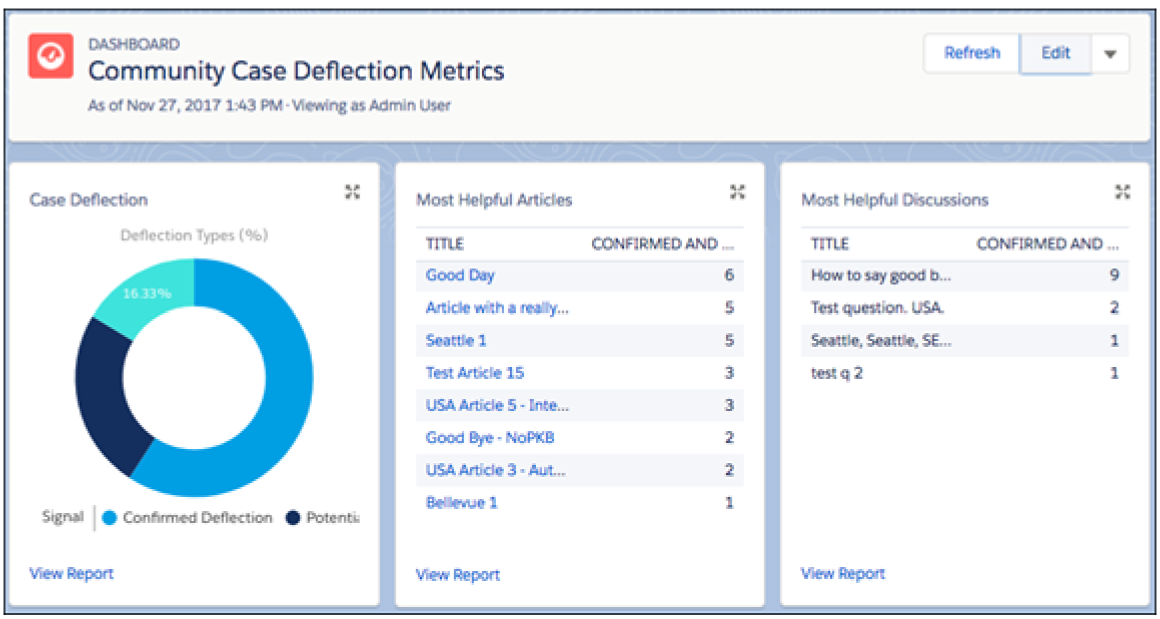
Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To install AppExchange packages:

- Download AppExchange Packages



Report Name	Description	Custom Report Type	On Dashboard?
Overall Case Deflection	Shows if a case was deflected, potentially deflected, or not deflected.	Community Case Deflection Metrics	✓
Most Helpful Articles	These articles have the most confirmed and potential deflections.	Community Case Deflection Metrics	✓

Report Name	Description	Custom Report Type	On Dashboard?
Most Helpful Discussions	These discussions have the most confirmed and potential deflections.	Community Case Deflection Metrics	✓
Articles with the Most Deflections	Articles with the most confirmed deflections.	Community Case Deflection Metrics	✓
Articles with Potential Deflections	Articles with the most potential deflections.	Community Case Deflection Metrics	✓
Articles with Unsuccessful Deflections	Articles that didn't deflect any cases.	Community Case Deflection Metrics	✓
Discussions with the Most Deflections	Discussions with the most confirmed deflections.	Community Case Deflection Metrics	✓
Discussions with Potential Deflections	Discussions with the most potential deflections.	Community Case Deflection Metrics	✓
Discussions with Unsuccessful Deflections	Discussions that didn't deflect any cases.	Community Case Deflection Metrics	✓

Unsupported Components

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

The following list identifies which reports are not supported in this release. If you are installing the package for the first time or are installing the package from scratch, you don't need to worry about these as they will not show up. If you are updating, be sure to remove these components.

Tip: The symbol ✦ identifies all the newly unsupported components in this release.

The following components are unsupported:

From the **Communities Dashboards**[6] folder:

- Activity 2.0 (and previous versions)
- Content 3.0 (and previous versions)
- Communities Search Dashboard (replaced with version 2.0)
- Groups 2.0 (and previous versions)
- Licenses 5.0 (and previous versions)
- Members 2.0 (and previous versions)
- Moderation 2.0 (and previous versions)
- Overview 2.0 (and previous versions)
- Q&A 2.0 (and previous versions)
- Self-Service 2.0 (and previous versions)
- Topics 3.0 (and previous versions)

From the **Communities Reports**[7] folder:

[6] You might have an older version of this folder called Communities Dashboards 2.0.
[7] You might have an older version of this folder called Communities Reports 2.0.

- A - Comments L30D
- A - Posts L30D
- A - Posts With Most Comments L30D
- A - Posts With Most Likes L30D
- A - Unique Daily Contributors L30D
- C - File Engagement Monthly
- C - File Uploads & Downloads Monthly
- C - Top 10 Files By Contributions
- C - Top 10 Files By Downloads
- C - Top 10 Files By Likes
- C - Top 10 Files By Shares
- C - Top 10 Users - Most File Contrib
- C - Top 10 Users - Most File Uploads L30
- C - Top 10 Users - Most Liked Files
- Daily Search Frequency (Last 30 Days)
- G - Least Active Groups L30D
- G - Most Active Groups L30D
- G - Top 10 Group Commenters
- G - Top 10 Group Posters
- Group Comments (Last 30 Days Trend)
- Group Posts (Last 30 Days Trend)
- L - # Cust Comm All Allocated Lic
- L - # Cust Comm Logins All Alloct (replaced with 2.0 version)
- L - # Cust Comm Plus All Allocated Lic
- L - # Cust Comm Plus Logins All Alloct (replaced with 2.0 version)
- L - # Partner Comm All Allocated Lic
- L - # Partner Comm Logins All Alloct (replaced with 2.0 version)
- L - CC Login-based - Monthly Logins (replaced with 2.0 version)
- L - CC User-based - Monthly Logins (replaced with 2.0 version)
- L - CCP Login-based - Monthly Logins (replaced with 2.0 version)
- L - CCP User-based - Monthly Logins (replaced with 2.0 version)
- L - Cust Comm Login Monthly Usage (replaced with 2.0 version)
- L - Cust Comm Login Monthly Trend
- L - Cust Comm Member Usage
- L - Cust Comm Plus Member Usage
- L - Cust Comm Plus Login Monthly Trend (replaced with 2.0 version)
- L - Cust Comm Plus Login Monthly Usage (replaced with 2.0 version)
- L - PC Login-based - Monthly Logins (replaced with 2.0 version)
- L - Partner Comm Login Monthly Trend (replaced with 2.0 version)
- L - Partner Comm Login Monthly Usage(replaced with 2.0 version)

- L - Partner Comm Member Usage
- Logins Used by Customer Licenses
- Logins Used by Partner Licenses
- M - Top 10 Members By Login
- M - Top 10 New Members By Logins
- Member-based Customer Licenses Used
- Member-based Partner Licenses Used
- Member Logins (Last 30 Days Trend)
- Member Logins (Last 30 Days)
- Member Logins (Last 90 Days Trend)
- Members (Last 30 Days Trend)
- Members (Last 90 Days Trend)[8]
- MO - Top 10 Flagged Items
- MO - Top 10 Flagged Members
- MO - Top 10 Members Who Flag Items
- MO - Top 10 Moderators
- New Members (Last 30 Days Trend)
- O - Top 10 Group Contributors
- Q - Answers in Groups L30D
- Q - Best Answers in Groups L30D
- Q - Questions in Groups L30D
- Q - Top Answered Questions Groups L30D
- Q - Unanswered Questions in Groups L30D
- S - Answers in User Profiles L30D
- S - Best Answers in User Profiles L30D
- S - Daily Page Views L30D
- S - Daily Unique Visitors L30D
- S - Questions in User Profiles L30D
- S - Top Answered Qs in User Profile L30D
- S - Unanswered Qs in User Profiles L30D
- T - Top 10 New Trending Topics L30D
- T - Topics Assigned Daily
- T - Topics Assigned Monthly
- T - Topics Created Monthly

[8] If you still want to use the Members (Last 30 Days Trend) and Members (Last 90 Days Trend) reports, you can re-create them. Keep in mind, to get the Member Count field, you need to create a custom report type with Networks as the primary object and Network Members as the secondary object. Then create a report using this custom report type and add the Member: fullname field. This report returns a snapshot of data, not trending data.

From the **Community Management Home Dashboards** folder—*all* dashboards; you can remove this folder if you installed the package with Chatter[9]

From the **Community Management Home Reports** folder:

- Contributions - Daily Trend
- Logins - Daily Trend[10]
- Logins - Monthly Trend[11]
- New Members - Daily Trend[12]
- Page Views - Daily Trend
- Q&A - Daily Trend

From the folder **Insights Adoption** (this entire folder and its contents are unsupported):

- Active Members By Comments
- Active Members By Comments Received
- Active Members By Likes Received
- Active Members By Posts
- Contributors Inactive For 7+ Days (replaced with 2.0 version)
- Influencers Inactive For 7+ Days (replaced with 2.0 version)
- New Members By Comments
- New Members By Comments Received
- New Members By Date Joined
- New Members By Likes Received
- New Members By Posts
- Recent Contributors (replaced with 2.0 version)
- Recent Logins

From the folder **Insights Activity** (this entire folder and its contents are unsupported):

- Discussions By Comments
- Discussions By Likes
- New Discussions (replaced with 2.0 version)
- New Discussions By Comments
- New Discussions By Likes
- New Discussions With No Comments
- New Members' Comments (replaced with 2.0 version)
- New Members' Posts (replaced with 2.0 version)

From the folder **Insights Files** (this entire folder and its contents are unsupported):

- Files By Comments
- Files By Downloads

[9] In the package with Chatter, all dashboards in this folder are no longer supported. In the package without Chatter, this folder and its dashboards still remain.
[10] Only unsupported in the package with Chatter. This report still remains in the package without Chatter.
[11] Only unsupported in the package with Chatter. This report still remains in the package without Chatter.
[12] Only unsupported in the package with Chatter. This report still remains in the package without Chatter.

- Files By Likes
- Files By Posts
- New Image Files (replaced with 2.0 version)
- New Office Files (replaced with 3.0 version)
- New Office Files (replaced with 2.0 version)
- New Video Files (replaced with 2.0 version)
- Recent Files (All) (replaced with 2.0 version)
- Recent Files By Comments
- Recent Files By Downloads
- Recent Files By Likes
- Recent Files By Posts

From the folder **Insights Groups** (this entire folder and its contents are unsupported):

- Groups Recently Archived (replaced with 2.0 version)
- Groups Soon To Be Archived (replaced with 2.0 version)
- Groups With Deactivated Owners (replaced with 2.0 version)
- Groups With Inactive Owners (replaced with 2.0 version)
- New Groups By Dates
- New Groups By Members

From the folder Insights Moderation[13]

- Content Blocked By Rule
- Content Flagged By Rule
- Content Replaced By Rule
- Discussions Flagged (All)
- Files Flagged By Members
- Flagged Comments 2.0 (replaced by 3.0 version)
- Flagged Direct Messages 1.0 (replaced by 2.0 version)
- Flagged Files 2.0 (replaced by 3.0 version)
- Flagged Messages (replaced by Flagged Direct Messages 1.0 and Flagged Private Messages 1.0 reports)
- Flagged Posts 2.0 (replaced by 3.0 version)
- Frozen Members (replaced by 2.0 version)
- Messages Flagged By Members
- Moderation Audit 2.0[14]
- Moderation Audit for New Members
- Posts Pending Approval (replaced by 2.0 version)

From the folder **Insights Self-Service**[15]:

- Best Answers (replaced with 2.0 version)

13 This entire folder and its contents are unsupported.
14 The contents of this folder were moved to the Moderation Audit Trail folder.
15 This entire folder and its contents are unsupported.

- Best Answers From External Members (replaced with 2.0 version)
- Questions (replaced with 2.0 version)
- Questions From New Members (replaced with 2.0 version)
- Questions Most Liked
- Questions With Answers From New Members (replaced with 3.0 version)
- Questions With Answers From New Members (replaced with 2.0 version)
- Questions With Most Answers
- Questions With New Answers (replaced with 2.0 version)
- Questions Without A Best Answer (replaced with 2.0 version)
- Questions Without An Employee Answer
- Questions Without Answers (replaced with 2.0 version)

From the folder **Insights Topics**[16] :

- Topics Added (replaced with 2.0 version)
- Topics Assigned (replaced with 2.0 version)
- Topics Most Talked About (replaced with 2.0 version)

From the **Misc Communities Reports** folder:

- Questions Escalated - Daily Trend

Service Community Scorecard

Track member use, service metrics, and search activity using the Service Community Scorecard.

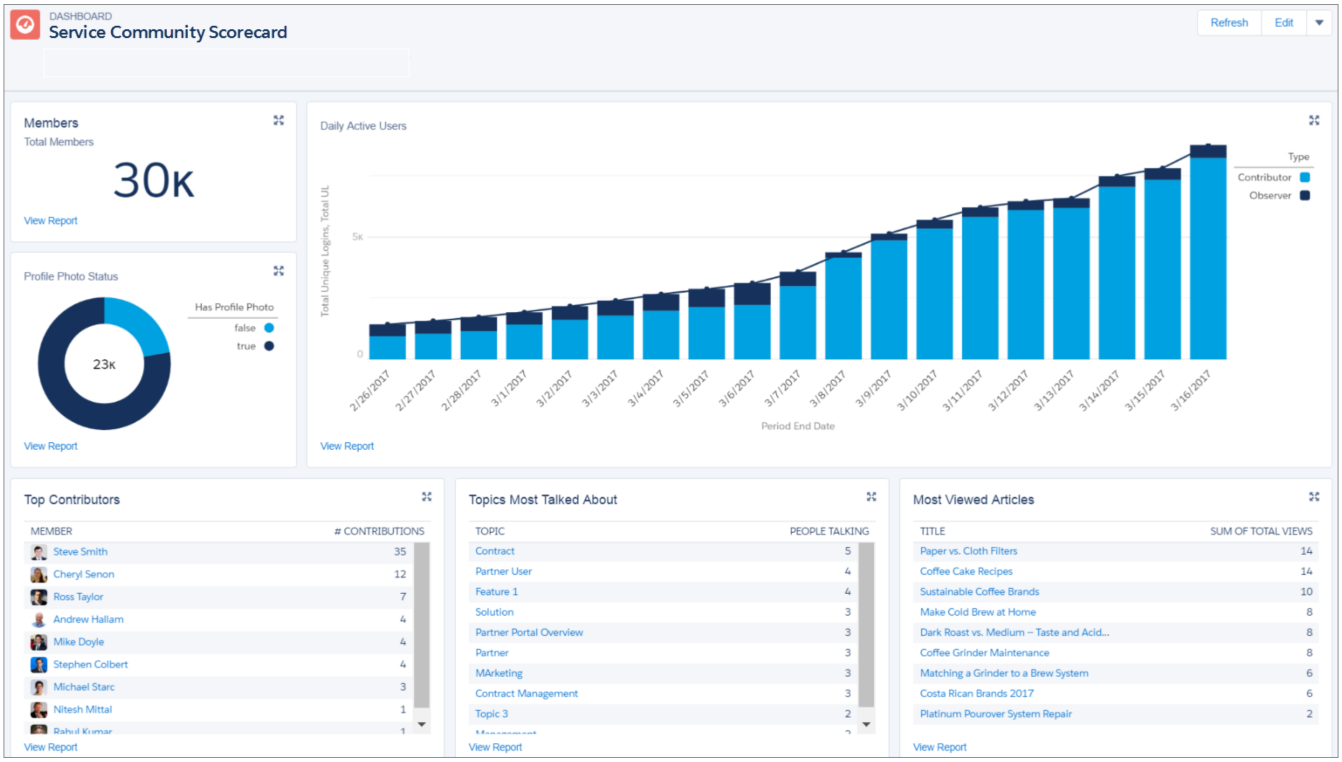
Understanding the health of your self-service community takes more than just keeping up with spam. Healthy communities allow for effective collaboration, provide quick resolutions to issues, and are full of engaged, active members. The Service Community Scorecard helps you track all this information in one place. To access the Service Community Scorecard, go to **Dashboards** > **Home** in Community Management or Experience Workspaces.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

[16] This entire folder and its contents are unsupported.



The Community Service Scorecard is available on the AppExchange through the Summer '17 Community Management Package. If it's your first time installing the package, the Service Community Scorecard automatically shows up in **Dashboard** > **Home** in Community Management or Experience Workspaces. If you've installed a previous version of the package, then manually map the Home dashboard to the Service Community Scorecard from **Dashboards** > **Settings**. Click the down arrow to the right of the dashboard mapped to Home and select the Service Community Scorecard.

Perhaps your employee or partner community tracks different information? You can customize and rename your scorecard. Go to your internal org and click the **Dashboard** tab. Search for Service Community Scorecard and click **Edit** to add or remove reports or change the name of your scorecard.

Note: The "Manage Dashboards" and "View All Data" permissions are required to edit this dashboard.

Visit the AppExchange to install or upgrade your Community Management Package. The Summer '17 version of the package is available shortly after the release.

Login History Report Codes

The Login History Report includes a Login Status Column that displays codes. Each code identifies a unique event that happens during login. The following list describes what each code means.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Contact Manager**, **Developer**, **Enterprise**, **Group**, **Performance**, **Professional**, and **Unlimited** Editions

Codes

Code	Meaning
0	Successful login
102	Username found, password invalid
107	More than one username found
301	Session timeout
302	Page requires login
303	Page requires different Salesforce login on same instance
304	Page requires Salesforce login on different instance
501	Cannot log in from given domain
502	Log in at given time
503	User must log in from org domain
601	Offline client trial expired
602	Offline disabled
603	Outlook disabled
801	Wireless client trial expired
802	Wireless disabled
901	Offline PDA trial expired
902	Offline PDA disabled
999	Unrecoverable error
1000	Client app not accessible for the login user
1001	Client app requires update for the login user
1201	Invalid ID specified
1300	Restricted login limit exceeded
1400	Invalid login or store not available for the org
1402	Store not available to a user
1403	Store down or inaccessible

Code	Meaning
20014	Password lockout in effect
20017	Organization marked as inactive
20018	User marked as inactive
20020	Organization locked out
20021	Organization closed
20032	Organization suspended
20037	Username found, password invalid
20058	CSS user password lockout
20253	User's profile doesn’t have access to this portal
20605	Organization is in maintenance
30001	The URL for the organization’s SSO authentication service is not a valid URL
30002	The organization’s SSO authentication service is down (couldn't connect, timeouts, SOAP fault returned, and so on)
30003	The organization’s SSO authentication service said that the supplied credentials are invalid

Set Up Report Management for External Users—Create and Edit Reports

Partner and customer users can create, delete, and edit reports in their own personal folder or, with sufficient permission, in a privately shared folder. You can grant partner and customer users permissions to create and edit reports through their profiles or permission sets. After you grant the required permissions, partners and customers can use the drag-and-drop Report Builder tool.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create permission sets or enable custom permissions in profiles:
- Manage Profiles and Permission Sets

To assign a permission set to a user:
- Assign Permission Sets

To share a report folder with external users:
- Manager folder access or Manage Reports in Public Folders

Important:

- If your organization existed before the Summer '13 release, then before granting external users permissions you must first turn on enhanced sharing for reports and dashboards.
- To create, customize, and delete reports, external users must use the Report Builder tool.

Data visibility is based on two things: the user role the partner or customer belongs to and your organization's sharing rules. Your organization's field-level security is respected. So, if a field isn't visible for external users, a partner or customer user doesn't see it in Report Builder.

1. To let external users create and edit reports, assign Create and Customize Reports, Report Builder, and Edit My Reports permissions through custom profiles or permission sets. If you want external users to export report data, also assign them Export Reports permission.

   In Setup, enter `Permission Sets` in the `Quick Find` box, then select **Permission Sets** or **Profiles**. Assign the following permissions:

   External User Permissions Needed to Create and Edit Reports

To create, customize, and delete reports in a personal folder:	Create and Customize Reports
To create, customize and delete their own reports in a privately shared folder with Viewer access:	Edit My Reports
To export report data:	Export Reports

   You can give permission to create and edit reports to all role-based external users with licenses. For example, you can give permission to Customer Community Plus and Partner Community. You can also give permission to all legacy role-based portal licenses, such as Customer Portal and Gold Partner.

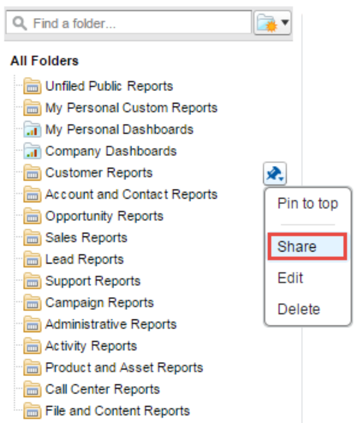
   Note:

   - These permissions aren't available to high-volume user licenses, such as Customer Community, High Volume Customer Portal, Service Cloud Portal, and Authenticated Website.
   - External users with legacy portal licenses can create and edit reports in Experience Cloud sites, but not in portals.
   - Users with Customer Account Portal, Partner Central, and Customer Service templates can create, edit, and delete reports in Experience Cloud sites. If you don't see the New Report button, enable reports and add the Report List page to your site. If the button doesn't appear after you enable Reports, republish your site.

2. If you want your external users to create or edit reports in a privately shared folder, grant them Viewer access on the folder.

   On the **Reports** tab in the Folders view, click next to the folder you want to share, then select **Share**.

   Note: Partner and customer users can't create, edit, or view reports in the Unfiled Public Reports folder.



Depending on the objects, fields, and categories that your external users can access, they sometimes see custom report types in the UI when they create a report. If a user has read access on any fields or objects included in the custom report type, custom report types are visible.

SEE ALSO:

Share a Report or Dashboard Folder in Salesforce Classic
Compare Access Levels for Report and Dashboard Folders

Track Experience Cloud Site Activity with Custom Reports

Create custom reports to track usage, moderation, and other activity.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Tip: Keep in mind that you can get preconfigured dashboards in the Salesforce Communities Management package available for download on the AppExchange.

To monitor the health of your Experience Cloud site, you can create custom report types and then create a report using that custom report type. If you want your community managers to see your report, you can create or edit a dashboard to include your report and then map the updated dashboard. To change the mapping of a dashboard, click **Dashboards** > **Settings**.

Note: Only reports that are based on the Networks object show Experience Cloud site-specific information. Using reports based on the Networks object, means you can create one custom report and use it across all your sites.

Use the following table to get started with reporting for Experience Cloud sites.

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.[1]
Chatter Usage	Networks > Feed Revisions	Create reports on posts and comments that your members have edited.
Chatter Usage	Networks > Groups	Create reports on groups.

High-level usage	Primary Object > B (Child Object) > C (Child Object, If Applicable)	Description
Moderation	Networks > Network Audits	Create reports on all moderation activity and history. To report on moderation activity in private Chatter messages, filter the report by `Audited Object Type` (on the Network Audits object) to equal `Chatter Message`.
Moderation	Networks > Network Members > Network Activity Audit — Moderators	Create reports on members who either flagged items or moderated a flagged item.
Moderation	Networks > Network Members > Network Activity Audit — User	Create reports on the members whose items were flagged, blocked, or replaced.
Moderation	Networks > Network Members > User Login	Create reports on frozen members.
Moderation	Networks > Network Moderations > Content Documents Networks > Network Moderations > Feed Posts Networks > Network Moderations > Feed Comments Networks > Network Moderations > Private Messages	Create reports on content that is currently flagged. These reports allow you to see the actual contents of the flagged item. For example, you can see the contents of a flagged private message to easily determine if the message is spam.
Moderation	Networks > Unpublished Feed Entities > Feed Posts	Create report on posts that are pending review and approval.
Public Activity	Networks > Network Public Usage Daily Metrics	Create reports on the daily public site page views and unique visitors.
Recommendations	Networks > Recommendation Metric	Create reports on custom recommendation usage.
Topic Activity	Networks > Topics	Create reports on topic activity.
Topic Activity	Networks > Topic Assignments	Create reports on topic assignments.
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 login activity. This report includes only direct logins to the site. If a user logs in to an org and then switches to a site, their login activity isn't included.
User Activity	Networks > Network Membership Daily Metrics	Create reports on the daily count of total active members, new members added, and external member logins by member type.
User Activity	Networks > Network Unique Contributor Daily Metrics	Create reports on the unique daily contributors. A member is counted as a contributor if they posted or commented on a group or a user profile.
User Profile Photos	Networks > Network Members	To report on user profiles with or without photos, filter the report by `Has Profile Photo` (on

High-level usage	Primary Object > B (Child Object) > C (Child Object, If Applicable)	Description
		the Network Members object) to equal `True` or `False`.

[1]To report on Chatter Messages, you must have the Moderate Experiences Chatter Messages permission.

Note: You can create reports based on other objects and expose them in Experience Workspaces. Keep in mind that they show data from across your org, not just for the site in which you're viewing them.

SEE ALSO:

Report on Experience Cloud Sites with AppExchange Packages
Create a Custom Report Type

Experience Cloud Sites Report and Dashboard Considerations

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

If the Reports and Dashboards tabs are exposed in the Experience Cloud site, external users can access reports and dashboards.

Important: To allow external users to create and edit reports, your org must use the enhanced sharing model.

You can give permission to create and edit reports to Experience Cloud site users with the following licenses:

Experience Cloud site licenses

- Customer Community Plus
- Customer Community Plus Login
- Partner Community
- Partner Community Login
- Lightning External Apps Plus

Portal licenses

- Customer Portal Manager
- Customer Portal Manager Custom (for Enterprise Administration users)
- Customer Portal Manager Standard
- Customer Portal Manager User
- Gold Partner
- Ideas Only Portal
- Overage Customer Portal Manager Custom
- Overage Customer Portal Manager Standard
- Partner
- Silver Partner ("Export Reports" permission isn't available to this license)

Note:

- These permissions aren't available to high-volume user licenses, such as Customer Community, High Volume Customer Portal, Service Cloud Portal, and Authenticated Website.
- External users with legacy portal licenses can create and edit reports in Experience Cloud sites, but not in portals.
- Users with Customer Account Portal, Partner Central, and Customer Service templates can create, edit, and delete reports in Experience Cloud sites. If you don't see the New Report button, enable reports and add the Report List page to your site. If the button doesn't appear after you enable Reports, republish your site.

After you grant permission to your external users, they still can't:

- Schedule reports or dashboards for email and refresh at a specific date and time

  Note: The refresh button is not available in Experience Builder sites accessed through mobile devices.

- Create, edit, or view reports in the Unfiled Public Reports folder

All role-based external users in your Experience Cloud site can refresh dashboards set up with "Run as specified user" and "Run as logged-in user" up to 1,000 times daily per org. Scheduled and automatic refreshes don't count against the limit. There is no refresh limit for internal users.

All role-based external users can be selected for the "Run as specified user" option.

SEE ALSO:

Create a Report from Your Site with Report Builder

Allow External Users to Access and Report on Tasks and Events

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Take the following steps to give access to your portal and Experience Cloud site users to report on tasks and events.

1. From **Salesforce Setup**, access the **Object Manager**.
2. Access Tasks or Events, depending on which objects you must give access to.
3. Click **Fields & Relationships** > `Public` > **Set Field-Level Security**. Check all the profiles you'd like to have access to this field and click **Save**.
4. Click **Page Layout** and add the Public field to your Task or Event object's page layout.
5. Click **Save**.

Note:

- These steps allow you to make the Public field visible to external users. However, for tasks and events to show up in reports, the Public field must be checked when the task or event is created. You can set up a flow to automatically check all new and edited tasks and events and being public. To include previously created tasks and events in reports, you must manually select the **Public** field.
- However, if you use the Tasks and Events standard report type, all activities are displayed regardless of whether the "Public" box is checked.

Google Analytics™ for Salesforce Communities Package

The Google Analytics for Salesforce Communities package contains pre-configured reports that track search activity within an Experience Cloud site.

Integrate Google Analytics with your self-service site to track search activity such as article views, page views, and object views. You can also track case deflection from the "Contact Support" page and get insights into the health of your self-service offerings.

USER PERMISSIONS

To create an Experience Cloud site:

- Create and Set Up Experiences AND View Setup and Configuration

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

IN THIS SECTION:

Google Analytics™ for Experience Cloud Sites

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Does your company use Google Analytics to track site analytics? Now you can use it to track search activity in self-service Experience Cloud sites and track deflection from cases. Using Google Analytics, you can dive deeply into your site's search behavior and pull that information into meaningful reports.

Note: This feature transfers customer data to a third party, Google Analytics.

Google Analytics integrates with your self-service Experience Cloud site to track user types, user IDs, pageviews on Salesforce objects, and customer search activity. We've also made it possible to turn on Google's IP Anonymization, if your policies or needs require it.

The Package includes:

- Search dimensions that can be rearranged for different drilldown configurations.
- Options for tracking user flow
- Reports that can be customized at multiple levels
- Preconfigured reports:
  - Contact Support Page Activity
  - Page Views by New and Returning Users
  - Page Views by Salesforce Object
  - Page Views by User Type
  - Search Activity
- Preconfigured dashboards:
  - Contact Support Activity
  - Search Activity
  - Page Views

Enable Google Analytics™ for Your Experience Cloud Site

Let Google Analytics access your Salesforce data to track Experience Cloud site user types, user IDs, page views on Salesforce objects, and customer search activity.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

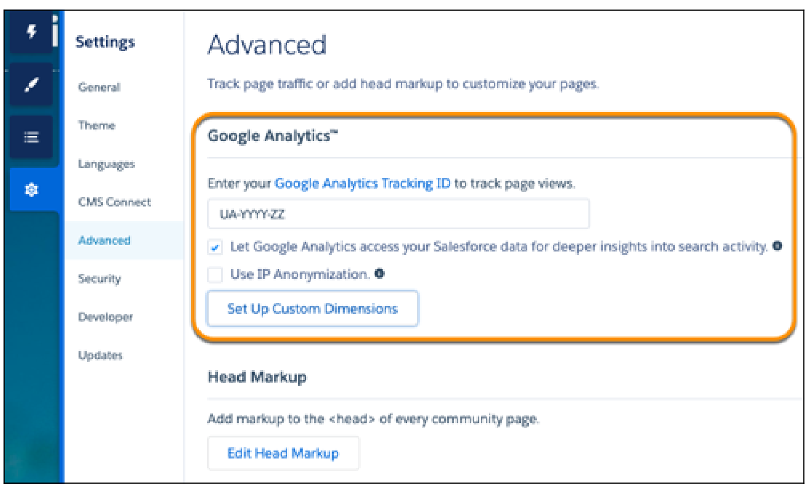
Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To customize or publish an Experience Cloud site
- Create and Set Up Experiences

To allow CSP trusted sites
- Customize Application or Modify All Data

1. In Experience Builder, go to **Settings** > **Advanced**, and enter your Google Analytics ID.



Step 1 lets Google Analytics access your data to collect page views.

Note: After you enter your ID, we automatically add the following sites to your org's CSP Trusted Sites. Adding these sites ensures that both Analytics and the AdWords features can function. If you already entered a Tracking ID, these sites were added automatically in Winter '19.

- `https://www.google-analytics.com`
- `https://stats.g.doubleclick.net`

If you already entered a Tracking ID, and these sites are listed as CSP Trusted Sites, this additional site was added automatically in Winter '20.

- `https://www.googletagmanager.com/gtag/js`

For more information about the Google Analytics ID, check the Google Analytics documentation.

2. Optionally, select the additional supporting Google features, depending on your needs and policies.

   Here's some information about supporting features.

   - **Let Google Analytics access your Salesforce data for deeper insights into search activity** to allow Google Analytics to track user types, user IDs, and customer search activity in your Experience Cloud site.
   - **Use IP Anonymization** to enable the masking of IP addresses on the Google server side to help with privacy compliance and concerns.
   - **Set Up Custom Dimensions** to match the index numbers assigned to Salesforce variables on page 802 in the Google Analytics console.

     Note: The Google Analytics console auto assigns sequential indexes based on how many variables you've created. Make sure to configure the custom dimension indexes in the site so that they match the indexes of the newly created variables.

3. To enable the service, publish the Experience Cloud site.

When you publish your site to enable the service, your site's search data streams directly to Google Analytics and appears in your Google Analytics reports.

SEE ALSO:

CSP and Lightning Locker in Experience Builder Sites

Set Up Google Analytics™ for Experience Cloud Sites

Set up Google Analytics to correctly capture usage and page view metrics for Experience Cloud sites.

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To customize or publish an Experience Cloud sites

- Create and Set Up Experiences

Before you set up Google Analytics, enable Google Analytics™ to integrate your Salesforce data with Google Analytics.

Create custom dimensions in your Google Analytics account that capture user type and Salesforce object information.

1. From your Google Analytics account, go to **Admin** > **Property** > **Custom Definitions** > **Custom Dimensions**, and click **+New Custom Dimension**.

   a. For the first index you want to use, enter the name: `User Type` and select **Hit** for the scope.

   b. For the second index, enter the name `Salesforce Object` and select **Hit** for the scope.

   Note: The Google Analytics console auto assigns sequential indexes based on how many variables you've created. Make sure to configure the custom dimension indexes in the site so that they match the indexes of the newly created variables.

2. Create a User-ID view.

   With the User-ID view, you can analyze how specific segments of traffic with an assigned ID engage with your content.

a. Go to **Admin** > **Property** > **Tracking Info** > **User-ID** and follow the instructions.
b. For the User-ID view, enter the name: `User Explorer`.

Example: Custom Dimensions

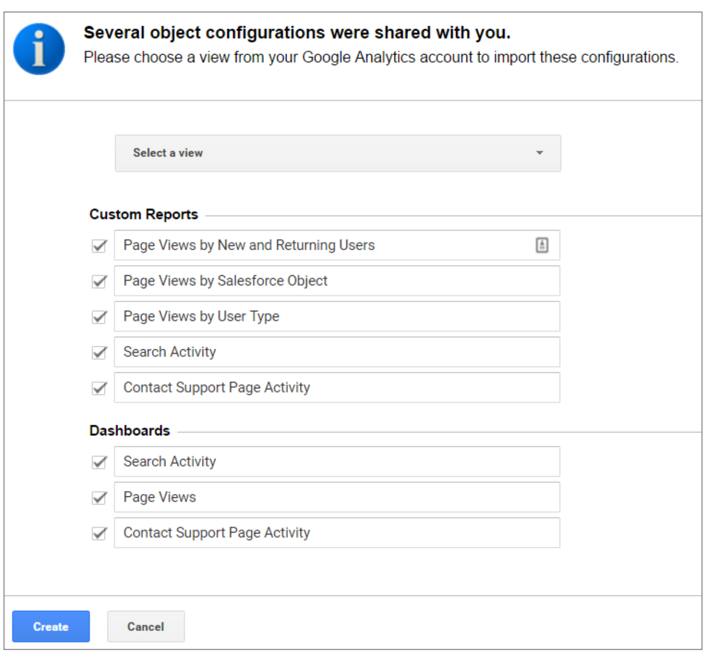
Now you can create your own reports or install the preconfigured Google Analytics for Salesforce Communities package on page 803.

Install Google Analytics™ for Experience Cloud Sites

Install preconfigured reports that integrate Experience Cloud site data with Google Analytics.

1. Make sure you've signed in to your Google Analytics account.
2. Click here or search for Google Analytics for Salesforce Communities in the Google Analytics Solutions Gallery.
3. Click the dropdown next to **Select a View** and select **User Explorer** under the account that you are adding the package to.
4. Click **Create**.
5. View your reports from **Customization** > **Custom Reports** in your Google Analytics account.

Example:



EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To customize or publish an Experience Cloud site

- Create and Set Up Experiences

Tip: You can drill down into the event type you are interested in viewing from each report. You can also create your own reports in Google Analytics and add them to your User View.

Google Analytics™ for Experience Cloud Sites Report Descriptions

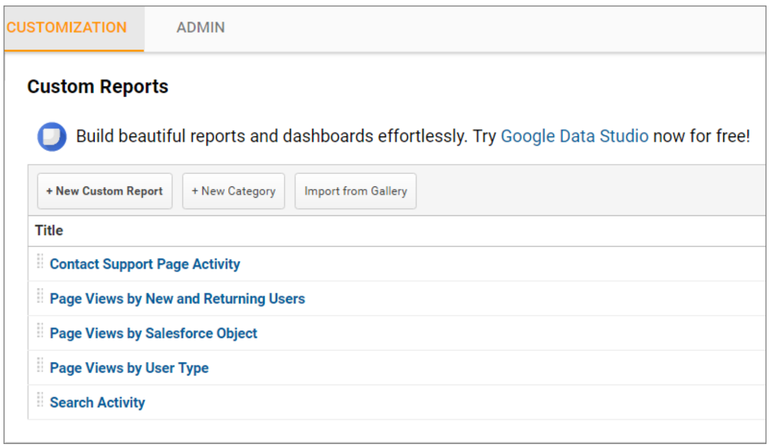
EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

The Google Analytics for Salesforce Communities package contains five reports that track new and returning visitors, page views, and search activity. You can also track case deflection from the Contact Support page and get insights into the health of your self-service offerings.

When you access Google Analytics, your reports are under **Customization** > **Custom Reports**.



IN THIS SECTION:

Contact Support Page Activity Report

The Contact Support Page Activity report tracks case deflection. This report can help you maximize your self-service offerings by tracking which articles resolved support issues and which subjects resulted in new customer support cases.

Page Views by New and Returning Users Report

The Page Views by New and Returning Users report tracks which page views are from new users and how many are from returning users.

Page Views by Salesforce Object Report

The Page Views by Salesforce Object report tracks how many times an object page is viewed.

Page Views by User Type Report

The Page Views by User Type report tracks how often each type of user is viewing a page.

Search Activity Report

The Search Activity report tracks which actions users take after entering a term in the search box.

Contact Support Page Activity Report

EDITIONS

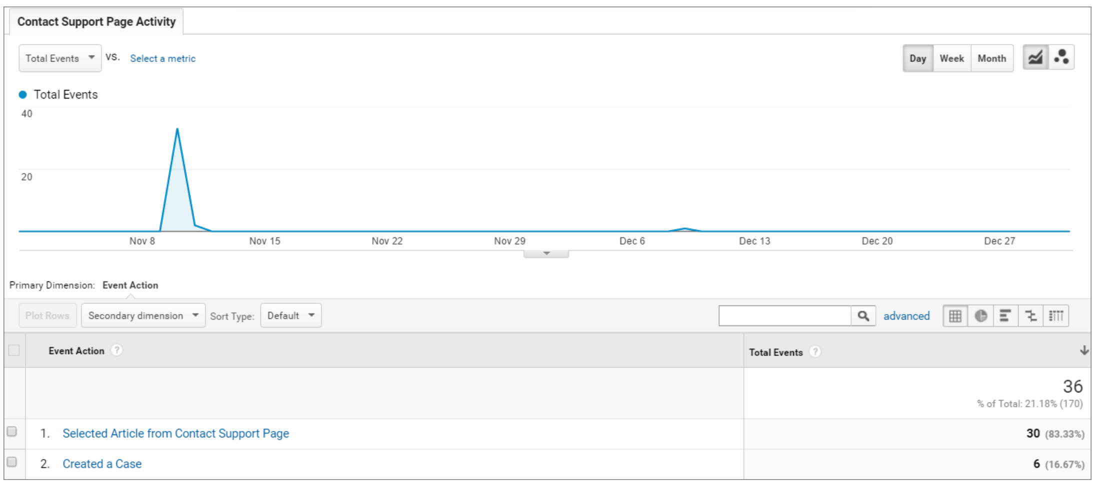
Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

The Contact Support Page Activity report tracks case deflection. This report can help you maximize your self-service offerings by tracking which articles resolved support issues and which subjects resulted in new customer support cases.

When a customer goes to the Contact Support page, they typically have a specific issue that they need help with right away. The customer has the option of entering their question into a search box and either selecting a recommended article or opening up a customer support case. The Contact Support Page Activity report tracks which cases are created and how many times a customer selected an article instead. You can drill into the report to:

- Track how many cases have been deflected from customer support
- See which articles were clicked the most
- See which subjects lead to a new support case



Page Views by New and Returning Users Report

EDITIONS

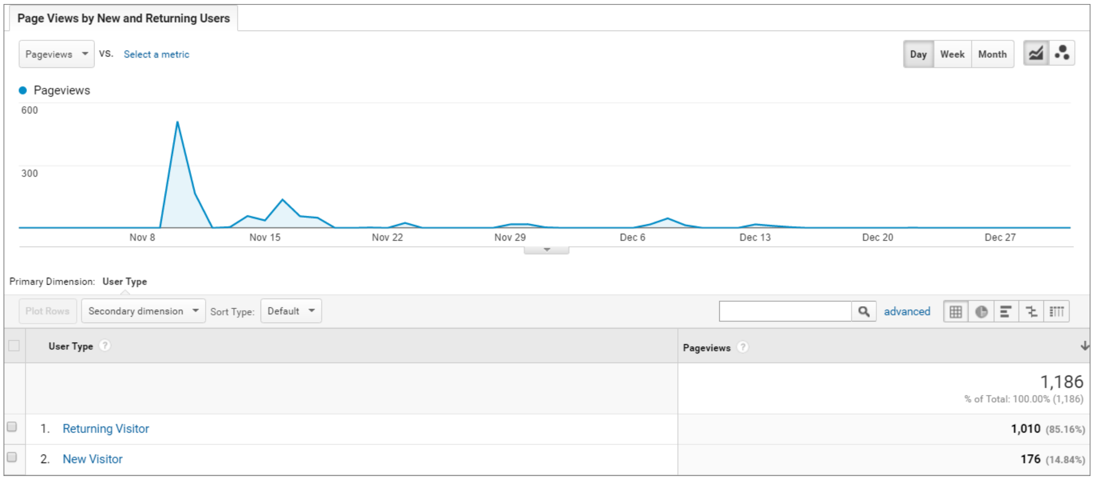
Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

The Page Views by New and Returning Users report tracks which page views are from new users and how many are from returning users.

You can drill into the report to:

- Track how active different types of user are within your Experience Cloud site
- See which pages are being viewed
- Get detailed information about the pages, such as page title and URL



Page Views by Salesforce Object Report

The Page Views by Salesforce Object report tracks how many times an object page is viewed.

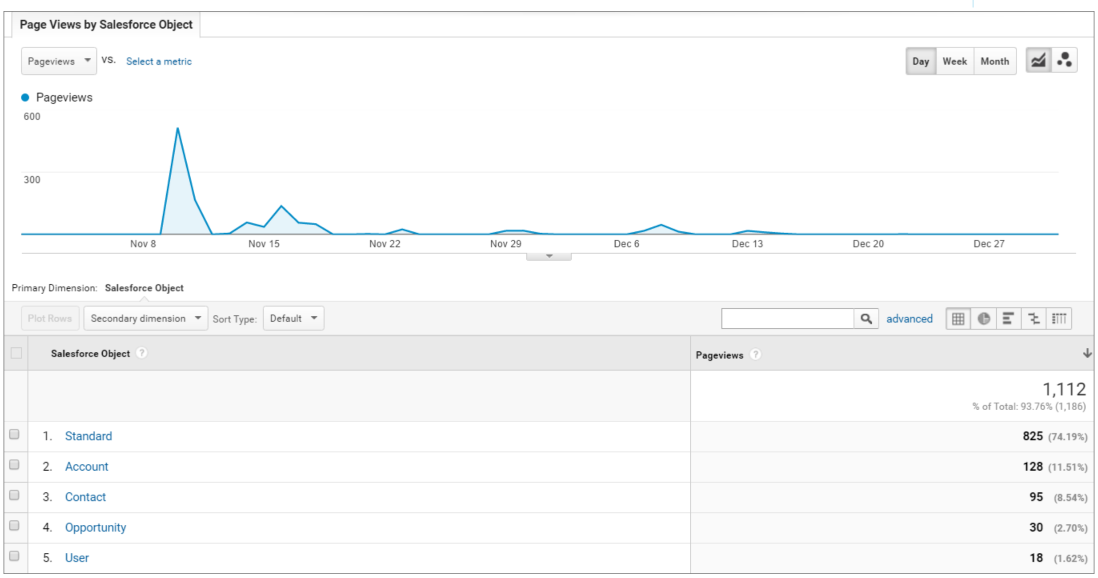
You can drill into the report to:

- Track how often an object page has been viewed
- Get more information about the page, such as page title and URL

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions



Note: Only overridden pages for objects are captured as different objects. Standard pages like the Home page and Contact Support Page are captured in the "Standard" Bucket.

Page Views by User Type Report

The Page Views by User Type report tracks how often each type of user is viewing a page.

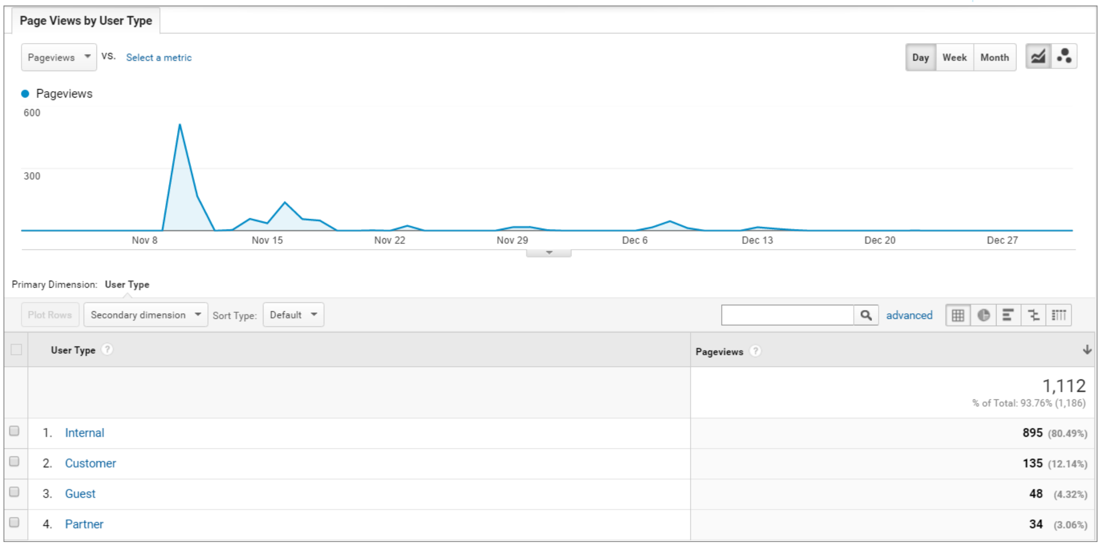
You can drill into the report to:

- Select the user type you want to report on
- Get more information about the page, such as page title and URL

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions



Search Activity Report

The Search Activity report tracks which actions users take after entering a term in the search box.

When a customer enters a term in the search box, recommended articles and similar questions are displayed to them as they type. From there, they can click an article or related question. Customers have the option of searching the entire Experience Cloud site or narrowing their search down to a particular topic. They also have the option of asking the site a new question.

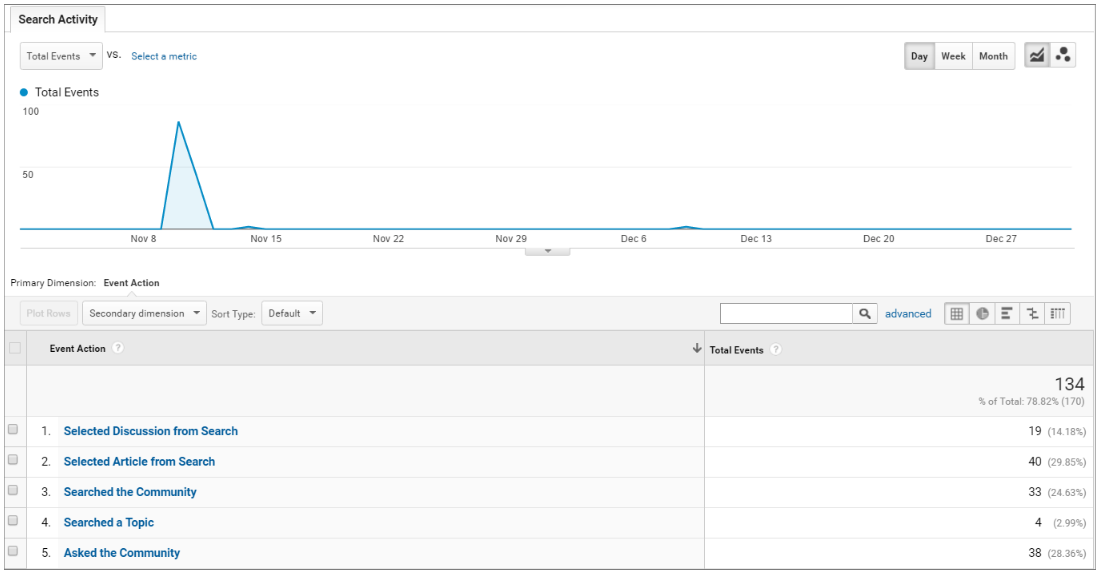
The Search Activity report tracks which action the customer takes from the page that they begin their search on. You can drill into the report to:

- Identify which search terms are being used with each action
- Track how many times a search term is being used

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions



Google Analytics™ for Experience Cloud Sites Dashboard

The Google Analytics for Salesforce Communities package contains three dashboards that visually display the key metrics tracked in the package.

When you access Google Analytics, your dashboards are under **Reporting** > **Dashboards** > **Private**. The Google Analytics for Salesforce Communities package contains three dashboards:

Note: The names of the dashboards can be customized. All other labels are not customizable.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

IN THIS SECTION:

Search Activity Dashboard

The Search Activity dashboard represents the search activity within the Experience Cloud site.

Contact Support Page Activity Dashboard

The Contact Support Page Activity dashboard represents the activity on the Contact Support page.

Page Views Dashboard

The Page Views dashboard represents the page views in your Experience Cloud site.

Search Activity Dashboard

The Search Activity dashboard represents the search activity within the Experience Cloud site.

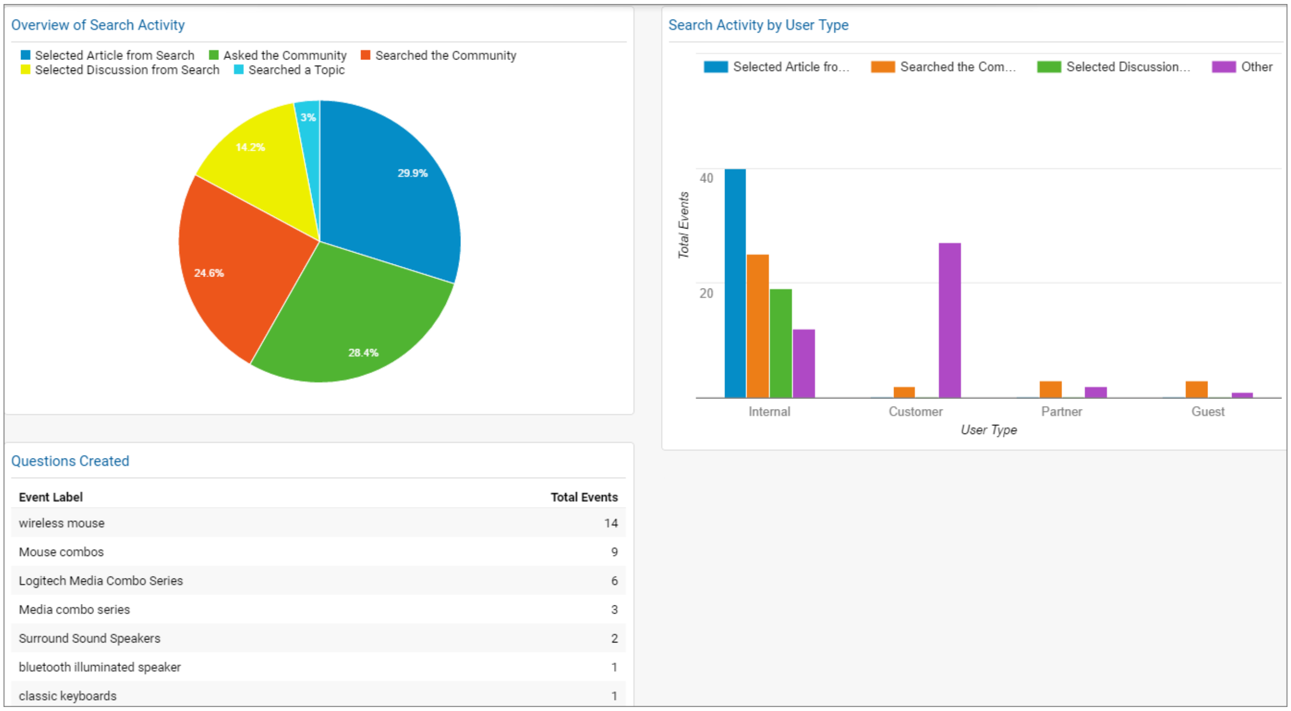
You can get the following information from this dashboard:

- Which actions were taken most frequently
- How Internal, Partner, Customer, and Guest users searched the site
- A list of search terms used to create questions

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions



Contact Support Page Activity Dashboard

The Contact Support Page Activity dashboard represents the activity on the Contact Support page.

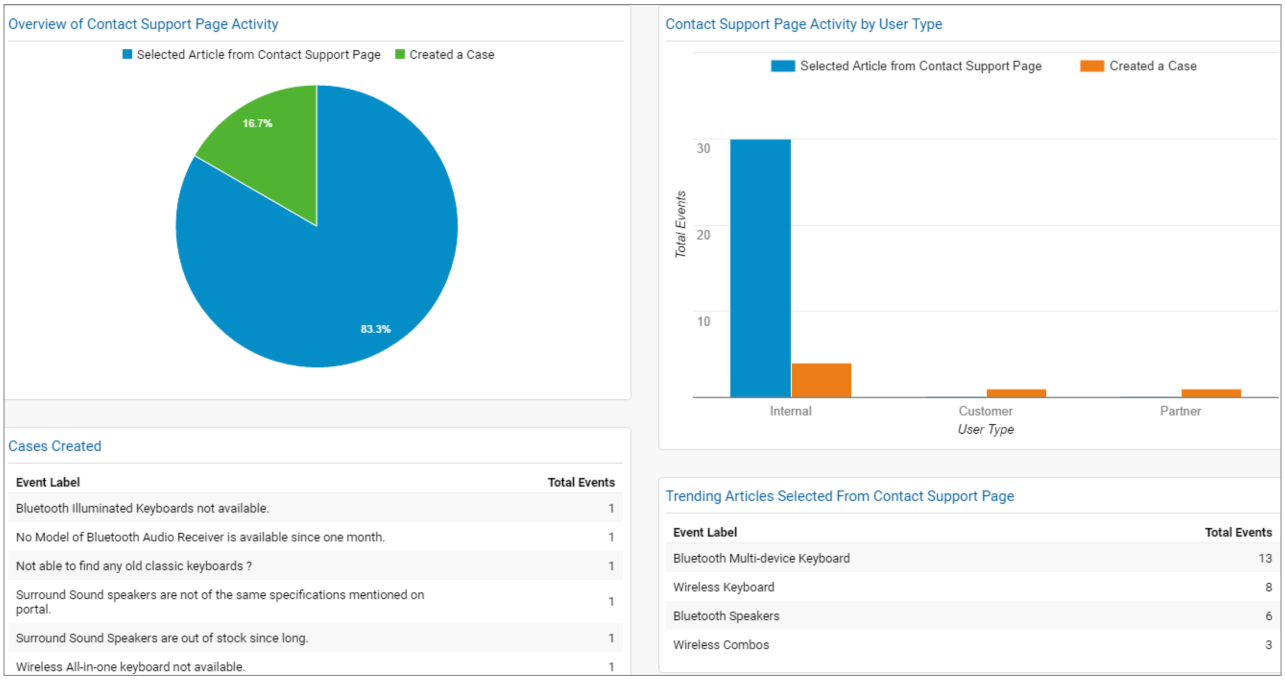
You can get the following information from this dashboard:

- How frequently a user selected an article or created a case from the Contact Support page
- Which types of users selected an article or created a case from the Contact Support page
- Which subjects lead to support cases
- Which articles were most frequently viewed

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions



Note: User Types refer to Internal, Partner, Customer, and Guest users.

Page Views Dashboard

The Page Views dashboard represents the page views in your Experience Cloud site.

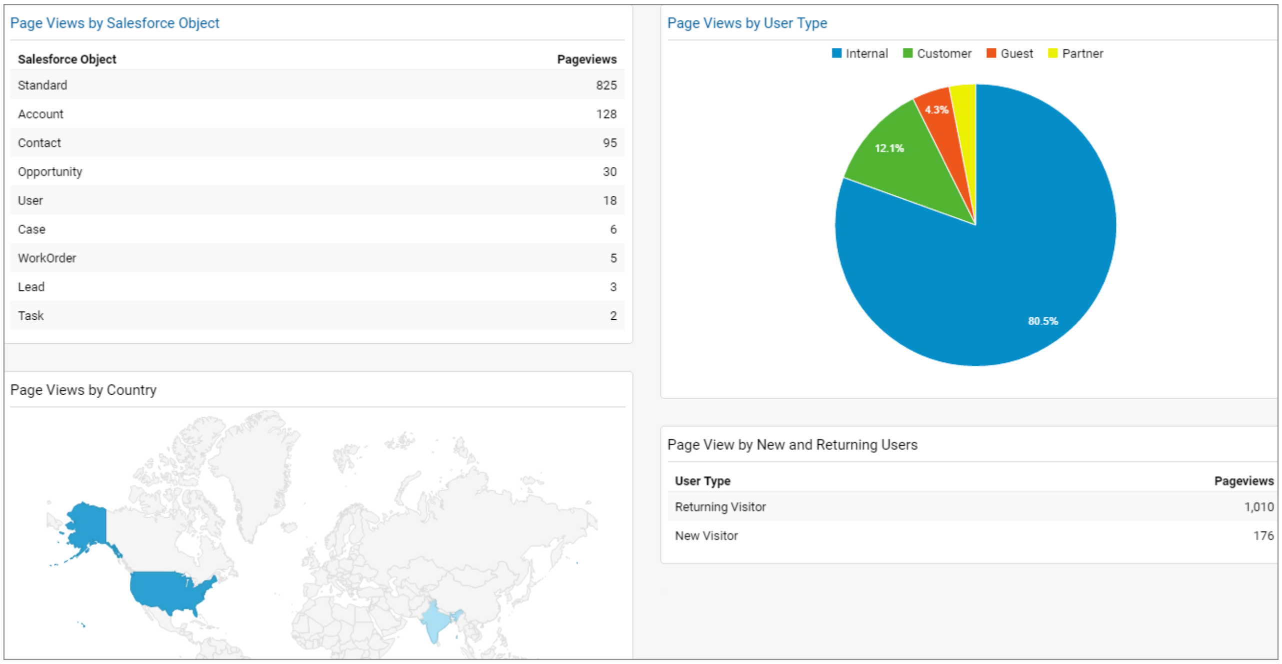
Track page views:

- By Salesforce object
- By User Type
- By location
- By new versus returning users

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions



Tracking User Flow

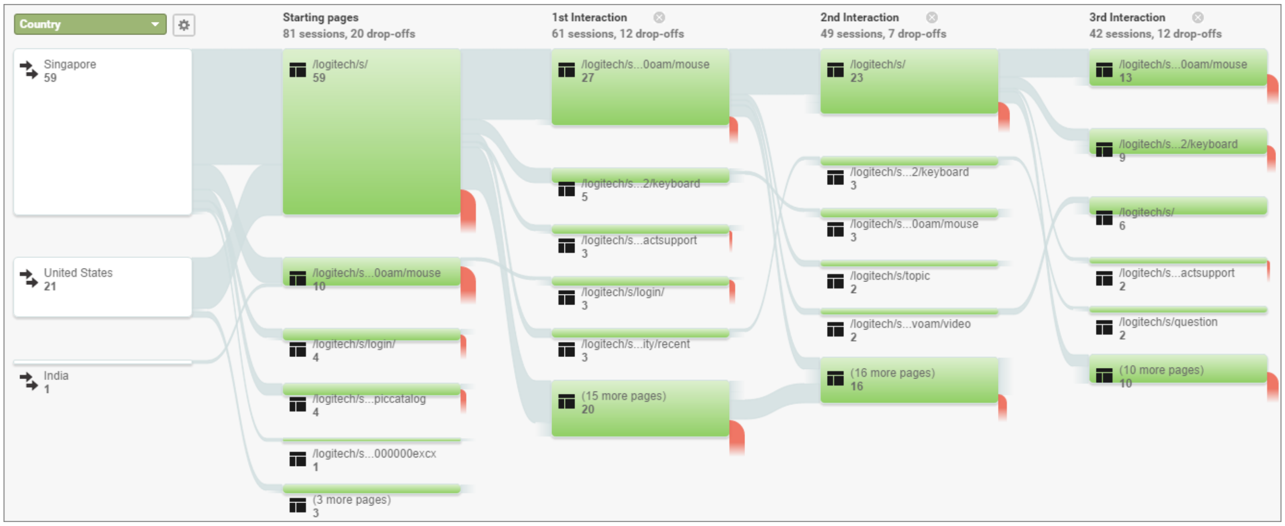
The User Flow tracks how different types of users are interacting with the Experience Cloud site.

User Flow is a graph that tracks a user's navigation throughout the Experience Cloud site. It provides insights into traffic patterns on your site. Traffic patterns provide valuable information about a site's effectiveness and the path a user is likely to take when resolving an issue. Go to **Reporting** > **Audience** > **User Explorer** > **User Flow** to view.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions



Delegate Management to External Users

Delegating an external user to manage other users increases capacity for growth and reduces bottlenecks at the administrative level. Instead of relying on a Salesforce admin to handle every new member or reset password request, grant permission to an external user to manage account members.

Delegate External User Administration

If your partner organizations have many users, you can delegate user administration to external users.

Available in: Salesforce Classic
Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To manage external users:

- Manage External Users

To create, edit, and delete profiles:

- Manage Profiles and Permission Sets

External users who are delegated administrators can:

- Create and edit external user records
- Generate new passwords for external users
- Deactivate existing external users
- Manage permissions sets for external users on their account

Keep the following in mind when delegating external user administration rights to users:

- You can grant delegated external user administration rights to users with Partner Community, Customer Community Plus, Gold Partner, Enterprise Administration, or Customer Portal Manager licenses.

  Note: The "Portal Super User" permission is automatically enabled on Customer Community Plus profiles when they are granted delegated external administration rights. Disabling "Delegate External User Administration" does not also disable the "Portal Super User" permission.

- You can only update custom profiles. To grant delegated external administration rights to a user using the same settings as a standard profile, clone the standard profile.
- Custom fields are not visible to the delegated external administrator when viewing user detail records in Salesforce Classic or Lightning Experience.

1. From Setup, enter `Profiles` in the Quick Find box, then select **Profiles**.
2. Select a profile with a supported license and clone it or click a custom profile.
3. Click **Edit**.
4. Select **Delegated External User Administrator**.
5. Click **Save**.
6. Click **Edit** in the Delegated External User Profiles related list.
7. Select the profiles you want users with this profile to be able to administer.
8. Click **Edit** in Delegated External User Permission Sets.
9. Select the permissions you want the delegated external user administrator to manage.
10. Click **Save**.

To activate or deactivate a user or reset their password, open their contact record from the Experience Cloud site they belong to and click **Manage External User** > **View Partner User**. You can activate or deactivate a user and reset their password from this page.

Consider the following when setting up delegated external user administration.

- 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 to Default On so that delegated administrators can easily manage contacts related to their accounts.
- To view personally identifiable information, such as username and alias, the **View User Records with PII** permission must be selected on the Delegated External User Administrator profile.
- Make sure that accounts and contacts are available in your site.
- Optionally, set field-level security and page layouts so that delegated external user administrators can access only the account and contact fields you specify.
- Delegated administrators are automatically granted the "View Roles and Role Hierarchy" permission. This permission is not revoked when you revoke the delegated user permission from the profile. If you don't want those users to view roles, make sure that you revoke the View Roles and Role Hierarchy permission from their profile.
- Make sure that external users can assign all the permissions in the permission sets that you want the delegated administrators to use.
- To activate or deactivate a partner or customer user, or to reset their password in Lightning Experience, add the following buttons to the **Salesforce Mobile and Lightning Experience Actions** section on the Contact page layout:
  - **Disable Partner User**
  - **Disable Customer User**
  - **Enable Partner User**
  - **Enable Customer User**
  - **View Partner User**

– **View Customer User**

SEE ALSO:

Create Experience Cloud Site Users

Grant Super User Access to a Partner User

Hide Personal User Information from External Users

Share More Salesforce Object Data in Your Site

Add Tabs to Your Salesforce Tabs + Visualforce Site

Delegated Account Management

Delegated Account Management

Give external users the power to manage account members and account brand information. Delegated account managers can create and edit a member, reset a member's password, and activate or deactivate a member. They can also upload brand logos and save company information for co-branded email templates to partner users, marketing campaigns, deal notifications, and websites.

External users who have been granted delegated external user administration rights can access Account Management.

1. To allow a user to access member and brand information, the admin adds the **Account Brand** and **Members** related lists to the **Accounts** detail page.
2. To access Account Management, click the user icon and select **Account Management**.

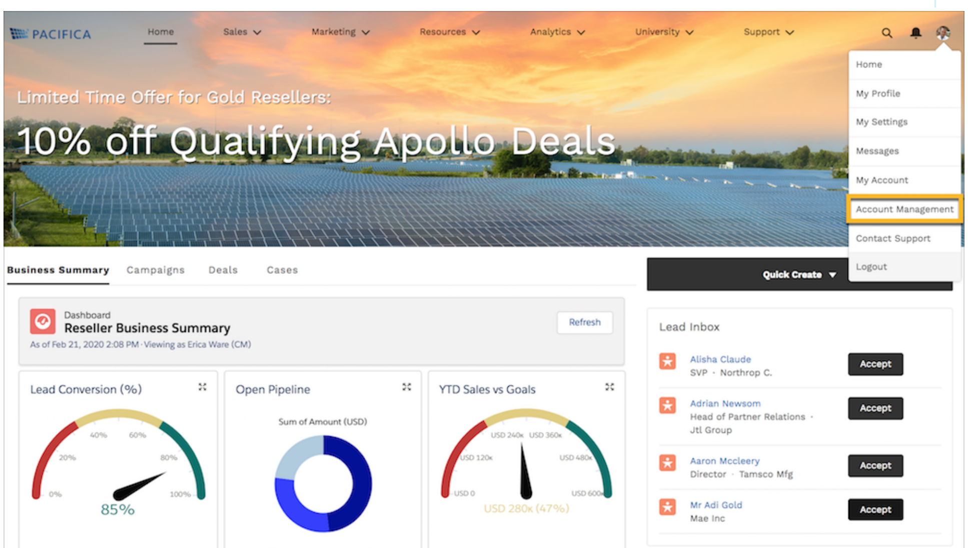
EDITIONS

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To manage external users:
- Manage External Users

To create, edit, and delete profiles:
- Manage Profiles and Permission Sets



3. Click the **Members** tab to manage members of your external account.

4. Click the **Branding** tab to update or view account brand information. Channel account managers and admins can create co-branded email templates, websites, and marketing campaigns from information uploaded to this page.

SEE ALSO:

Manage Experience Cloud Site Members in Account Management

Manage Partner Brands in Account Management

Manage Experience Cloud Site Members in Account Management

Partner users with delegated external admin permissions can keep account members moving forward with the Members tab on the Account Management page. With just a few clicks, delegated admins, internal users, and administrators can activate, deactivate, create new, and edit members. They can also reset member passwords.

Partner users with delegated external user administration rights can access Account Management from their Experience Cloud site.

Admins, internal users, and delegated admins can manage members of their partner account from the **Members** tab.

1. To allow delegated external administrators access to member information, add the **Members** related list to **Accounts**.
2. From their site, they can click their username and select **Account Management**.
3. To access a list of their site's members, delegated external admins can select the **Members** tab.

EDITIONS

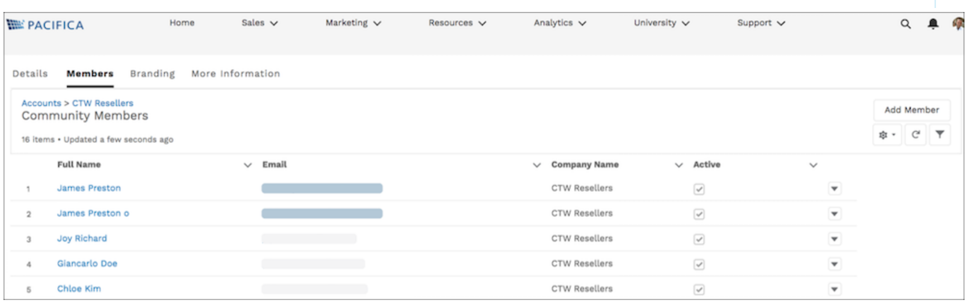
Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

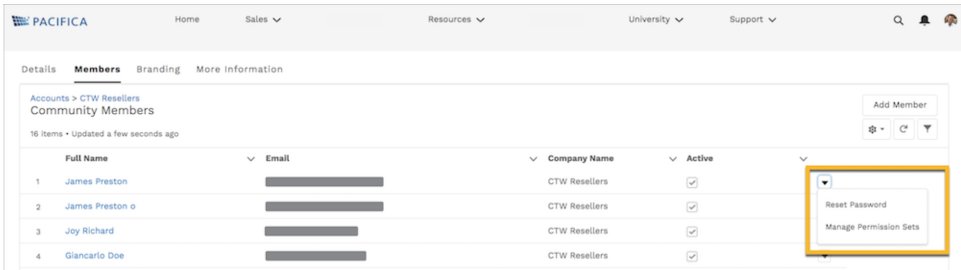
USER PERMISSIONS

To manage external users:
- Manage External Users

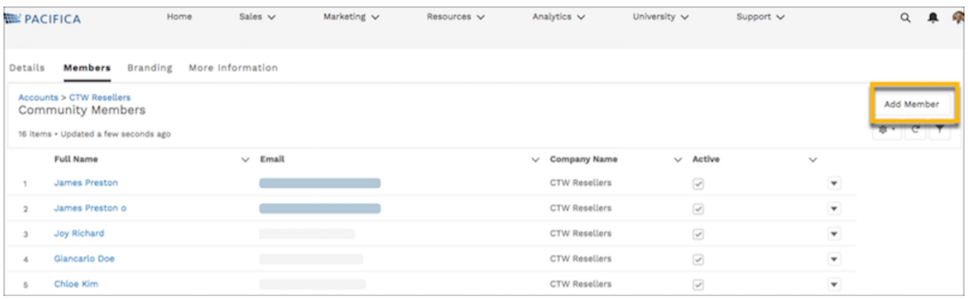
To create, edit, and delete profiles:
- Manage Profiles and Permission Sets



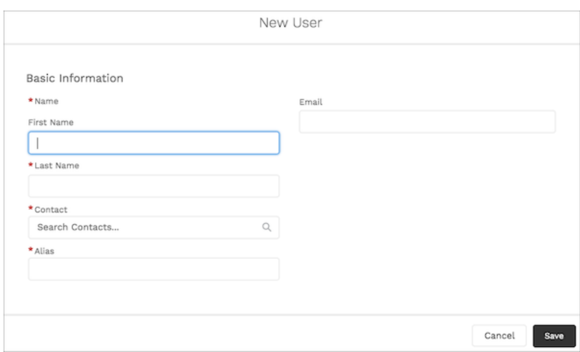
4. To reset a member's password or manage their permission sets, they can select an option from the actions menu on the member's row.



5. They can select or deselect the box in the **Active** column to activate or deactivate a member.
6. To add a member to the account, they can click **Add Member**.



7. To configure a light user creation form for the delegated administrator to use when adding new members, go to **Setup** > **Object Manager** > **User** > **Member Page Layouts**. Language and Locale Settings and Chatter Settings can be removed from the form to simplify the member creation process. Values for the removed fields default to the same settings as the delegated administrator.



If the delegated administrator is entering values other than their own, leave the Local and Language and Chatter settings on the form.

Manage Partner Brands in Account Management

On the Branding tab of the Account Management page, partner users with delegated external admin permissions can update and access partner brand information. Channel managers can create co-branded emails, marketing campaigns, websites, and apps.

Partner users who have been granted delegated external user administration rights can access Account Management from their community.

Channel account managers and admins can create co-branded email templates, websites, and marketing campaigns from information uploaded to the **Branding** tab.

1. To allow partners to access brand information, add the **Account Brand** related list to the **Account** page layout.
2. From their site, delegated external administrators can click their username and select **Account Management**.
3. To access, update, or view branding information for an account, they can select the **Branding** tab.

EDITIONS

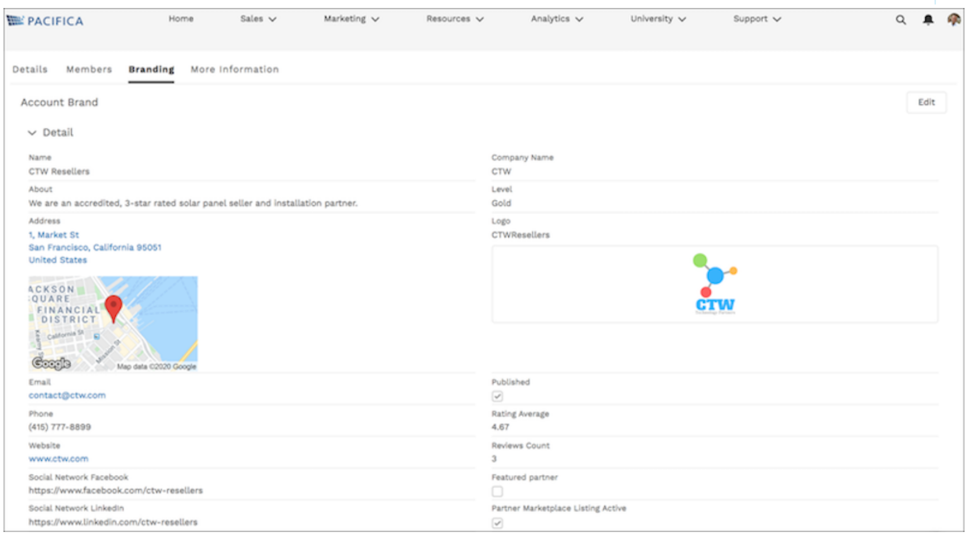
Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To manage external users:
- Manage External Users

To create, edit, and delete profiles:
- Manage Profiles and Permission Sets



> **Note:** When accounts containing brands are merged, the brand information associated with the master account is retained. Brand information associated with non-master accounts is moved to the Recycle Bin, even if there's no brand information for the master account.

4. To add account brand details, delegated external admins can click **New**.
5. To update account brand details, they can click **Edit**.
6. To create co-branded emails or templates using information from the Branding tab, delegated external administrators can use the merge fields under **Sender Brand**. These merge fields pull information directly from the Account Brand page. Users must have access to Account Brand to use the Account Brand merge fields, otherwise the merge fields are unresolved.

Allow External Users to Manage Other Accounts with Account Switcher

Allow external users to switch to other external accounts using the Account Switcher component. And authorize access to manage the other accounts' users.

Configure an external managed account to designate the user who can switch to another account and to specify what that user can do on those accounts. You can use `{!CurrentUser.effectiveAccountId}` as the Account Id attribute value in components that track account IDs. This updates the data displayed in the component to the account that is being switched to when Account Switcher is used. For example, the Related Record list component displays the Members list on the Account Management page and uses `{!CurrentUser.effectiveAccountId}` by default in the Parent Record Id field. When a managing user switches to the target, or managed, account, the information on the Account Management page switches to the context of the target account. The managing users can manage target account members from there.

To drive new behavior based on the account switcher, you can create a custom component and use the account ID `{!CurrentUser.effectiveAccountId}`.

With Authorized Access, the managing user of an external managed account can manage permission sets for other users, reset passwords, activate, deactivate, or add members to the target account.

1. Add the External Managed Account related list to the Account page.
   a. From the Object Manager, enter `Account` in the Quick Find box.
   b. Select **Account** > **Page Layouts** > **Account Layout**.
   c. Click the **Related List** button, and drag the External Managed Account related list to the page.
   d. Go to the External Managed Account related list and click the wrench icon to open the related list properties menu.
   e. Under Columns, add Authorized Access to the Selected Fields box and click **OK**.

      Access is only available for Experience Builder sites.
   f. Save your changes.
2. Configure the external managed account.

EDITIONS

Available in: Lightning Experience in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

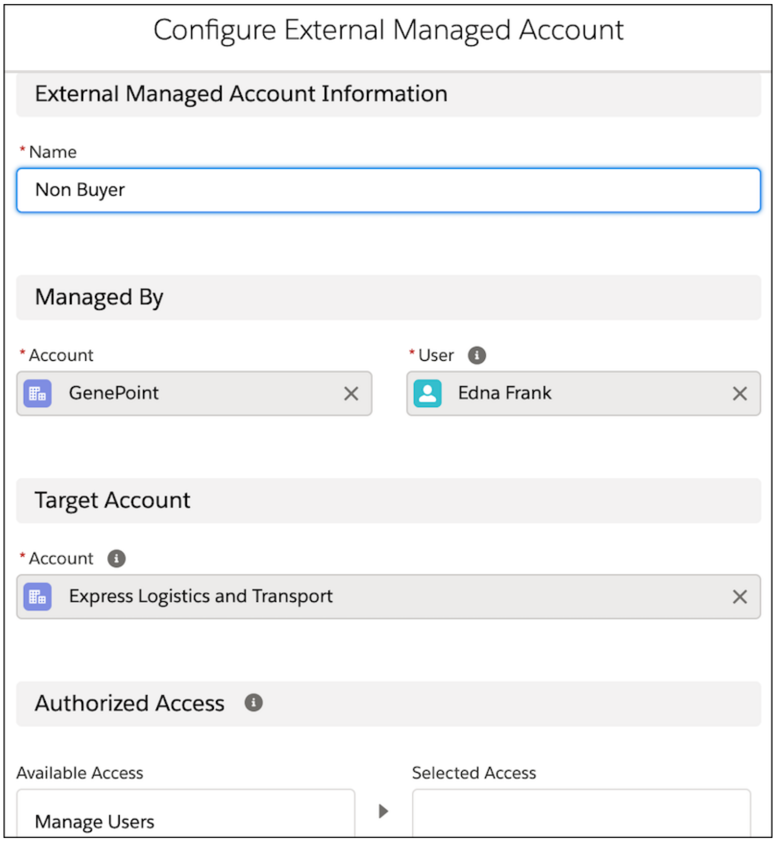
USER PERMISSIONS

To create, edit, and delete profiles:
- Manage Profiles and Permission Sets

To access the account switcher component:
- Account Switcher User

To be granted Manage Users access:
- Delegated External User Administrator

To view accounts:
- Read access on Accounts



a. From the user's account record, scroll down to the External Managed Accounts related list.

b. Click **Configure**.

c. In the User field, enter the user's name. This user can switch between their account and the target account and view all contacts associated with the account.

d. In the Target Account field, enter the name of the account that's being managed and switched to.

3. To allow the managing user to reset passwords, add members, and activate or deactivate members of the target account, add Manage Users access.

   a. Grant the managing user Delegated External User Administrator permission. For more information on granting this permission, go to Delegate External User Administration on page 812.

   b. Under Authorized Access, add **Manage Users** to the Selected Access box.

   c. Save your changes.

4. Access the target account from a portal or site's user profile menu. If you are using the new customizable user profile menu, add the Switch Accounts menu item. Otherwise, it appears by default.

   a. Go to Experience Builder, and click the user profile menu at the top of the screen.

   b. Click **Edit User Profile Menu**.

   c. Click **+ Add Menu Item**.

   d. In the Type field, select **Event**.

   e. In the Event field, select **Account Switcher**.

f. Click **Save Menu**.

5. The managing user can switch from their account to the target account's community home page by clicking their user profile and selecting **Switch Accounts**.
   a. When the managing user clicks **Switch Accounts** from the user profile, the Switch Account Modal opens.
   b. A list of all accounts appears, including the managing user's account and any target accounts that they are associated with. A blue check mark indicates the account that the managing user has switched to. (My Account) indicates the account that belongs to the managing user.
   c. After clicking a target account name, managing users are automatically redirected to the target account's site home page.

Create the Account Switcher User Permission Set

Create a permission set that allows an external user to use the Account Switcher component to switch to a different account.

Available in: Lightning Experience in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To enable Digital Experiences and create or change custom fields:
- Customize Application

To create, customize, or publish an experience AND to create stores and administer store settings:
- Create and Set Up Experiences
- View Setup and Configuration

To create, edit, and delete profiles or permission sets:
- Manage Profiles
- Permissions Sets

To assign permission sets:
- Assign Permissions Sets

The Account Switcher component lets an external user switch between their account and another account. External users use the Account Switcher to manage members associated with different accounts, and to make purchases on behalf of other accounts. Admins can customize components that utilize Account Switcher to drive business logic, by using `{!CurrentUser.effectiveAccountId}` as the attribute value for account Id. This permission set gives the user access to the Account Switcher component.

1. From Setup, enter `Permission Sets` in the Quick Find box, then select **Permission Sets**.
2. Under Permission Sets, click **New**.
3. Name the permission set `Account Switcher User`.
4. From the License dropdown menu, select either a **Customer Community Plus** or **Partner Community** license.
5. Click **Save**.
6. Under Object Settings, select **Account**.
7. For all Account fields, select **Read Access**.
8. Click **Save**.
9. To add this permission to the external user who is managing an account. Scroll down to Systems, and click **System Permissions**.
10. Click **Edit**, and select **Account Switcher User**.
11. Save your changes.

Manage Partner Relationships with Experience Cloud Sites

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Experience Cloud sites are a powerful tool for partner relationship management. Invite partners to a site and share CRM data with them to drive channel sales and marketing. Create a shared pool of leads and pass them to partner users in the site. Configure deal registration to allow partners to submit qualified deals, minimize channel conflict, and get early pipeline visibility. Use the power of Lightning and Salesforce and drive your bottom line together.

Note: If you have an existing partner portal, you can continue to use the portal to collaborate with partners. However, we strongly recommend you migrate your partners to an Experience Cloud site. Partner portal licenses can be reused in a partner site.

Salesforce offers a powerful Lightning solution to help you build a partner site with button clicks, and no code: Partner Central. A site allows your partner users to log in to Salesforce through a separate website and access data you've made available only to them. In a partner site, you can:

- Extend Salesforce to securely expose CRM data with partners.
- Recruit, onboard, and educate partners (training and certifications).
- Manage your channel sales with programs, tiers, business plans, and partner scorecards.
- Manage lead distribution, deal registration, and quoting for channel sales.
- Streamline channel marketing with marketing development funds (MDF), marketing campaigns, and co-branded email communications.
- Provide a rich, personalized and mobile-ready experience to drive partner productivity
- Manage, track, and forecast partner sales ***alongside*** your direct sales in your Salesforce org.

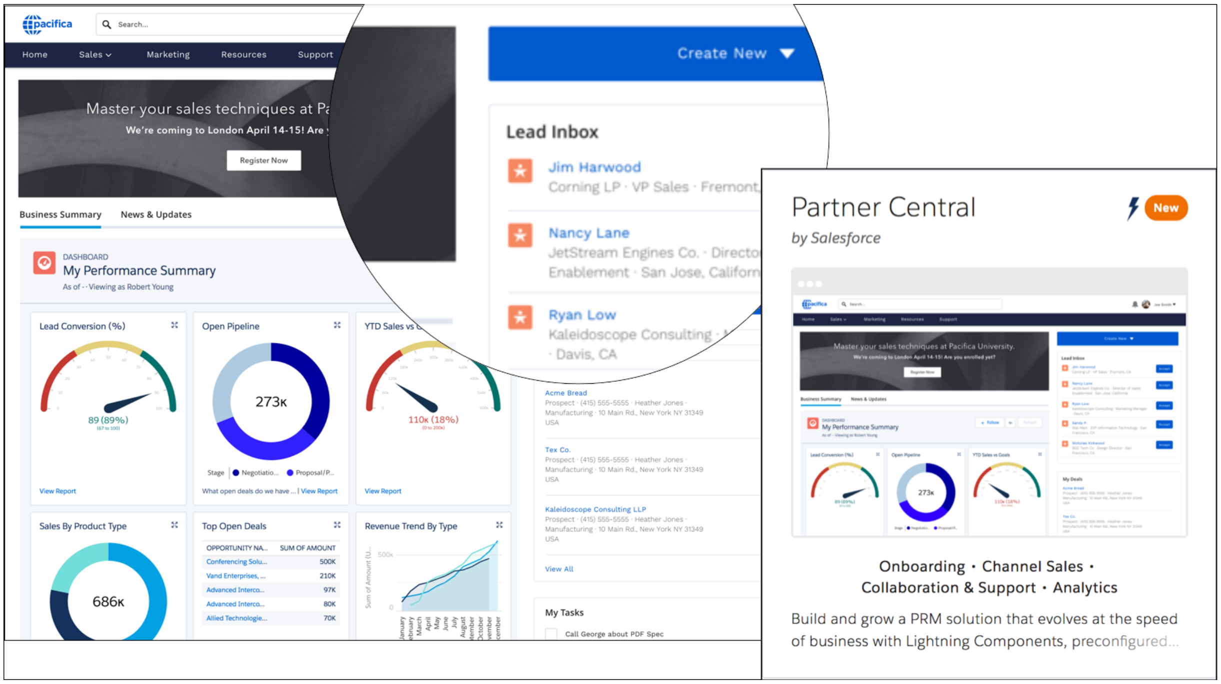
With Experience Cloud sites, you can publicly share information that you want all partners to see in a single location. You can also share data privately with specific partner users in the same site and restrict access with the security built into Salesforce.

Example: Here are a few industry examples of how a company can use a site to drive partner sales:

- A technology company can work with resellers to pass leads, register deals, and market products together
- A manufacturer can work with its distributors, wholesalers, and retailers in sites.
- An insurance company can work with independent brokers to track leads and sell insurance products.

Partner Central—Build Lightning Partner Sites

Quickly set up a custom, branded space where you can invite your partners and work on driving channel sales and marketing together. The Lightning Partner Central solution is optimized for channel managers and partners to collaborate on and track sales data. A simplified setup combined with rich branding and a responsive UI lets you quickly build an exclusive online experience for your partners.



Partner Central comes predesigned with partner sales workflows in mind so you can build and grow your partner network and bring CRM to your partners in a shared space:

- Use the Lead Inbox component to configure lead distribution
- Configure deal registration and allow partners to submit qualified leads to beat competition
- Share training materials, sales collateral, and other resources
- Provide market development funds to drive deals and incentivize partners
- Map reports and dashboards of your choice to track deal closure, lead activity
- Organize channel partners into programs and levels to provide them with different experiences and resources based on their rank and region
- Evaluate and promote partner users based on their performance with scorecards that track them against KPIs
- Share marketing campaigns and brand assets to provide the structure and guidance necessary for partners to successfully execute campaigns.
- Configure Google Analytics to monitor site activity

Get started with this handy recipe of setup tasks to create your own site with Partner Central.

Create a Partner Site with Partner Central—Setup Tasks

Partner Central is designed with partner sales workflows in mind and comes with components and pages that you can use directly or customize easily.

Get started with your own Lightning partner Experience Cloud site! We've put together a high-level roadmap—or a recipe, if you will—of the decisions and tasks involved with setting up a site with Partner Central.

Planning	• What's Your Partner Experience Cloud Site Strategy?	*Prep Your Salesforce Org for a Partner Site*	• Set Up the Channel Manager Role • Create Partner Accounts

	• Buy Partner Licenses • What Template Can I Use? • Experience Builder Site Limitations		• Create Partner Users • Partner Profiles, Roles, and Sharing Considerations • Super User Access • Delegated Administration
Set Up a Partner Site	• Update Org-Wide Settings • Check Out Experience Workspaces • Create an Experience Cloud Site • Share More Salesforce Records in Your Experience Cloud Site • Add more features with Guided Setup • Experience Cloud Sites and Site Users in Your Salesforce Org	*Advanced PRM and Community Features*	• Lead Distribution • Deal Registration • Market Development Fund • Channel Programs and Levels • Community Moderation • Campaign Marketplace • Direct Messaging • Configure Dashboards to Monitor Your Community • Create Pages and Groups Targeted at Specific Audiences
Site Design	• Customize Your Experience Builder Site • Customize Experience Cloud Site Pages and Components (Builder) • Customize Experience Cloud Site Navigation • Which Components Can I Use with Partner Central? • Customize the Lead Inbox • Customize the Quick Create Actions • Custom Theme Layouts	*Site Reporting*	• Experience Cloud Site Reports and Dashboards • Custom Reports • Report Management for Partners • AppExchange Reporting Packages for Experience Cloud Sites • Google Analytics™

Enable Partner Functionality in Your Org

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Buy partner licenses to enable partner functionality in your org. Partner licenses are required to use the Lightning Partner Central community template, set up partner accounts, and create partner users in your org.

When you buy partner licenses, the following functionality is enabled in your org:

- The Partner Central Experience Cloud Site template.
- The default Partner User profile. You can clone it to create custom partner profiles or extend data access via permission sets.
- Three standard partner roles: Partner User, Partner Manager, Partner Executive. When you create partner accounts, you can associate one of these roles with the partner users.
- A sharing rule group and category targeted at partner users.

- The **Manage External Account** and **Enable as Partner** buttons on accounts.
- A **Manage External User** and **Enable Partner User** button on contacts.

Note: If you have previously purchased partner portal licenses, you already have these features in your org.

Templates Supported for Partner Sites

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

The choice of template for creating a partner Experience Cloud sites depends on your company's branding requirements and the development effort you can invest in for the design of your site.

Use Partner Central to use a highly customizable template that uses slick Lightning components, just like Customer Service. Partner Central is designed with channel sales workflows in mind, and comes with the Lead Inbox component to support lead distribution. You can also configure deal registration to allow partners to submit leads from the site with a few button clicks and no code. Plus, you get the same rich, responsive Lightning look and feel across devices, including mobile devices.

If you prefer the Salesforce Classic look and feel, use the Salesforce Tabs + Visualforce template. This option allows heavy rebranding, but you'll need developers with Visualforce skills.

What's Your Partner Experience Cloud Site Strategy?

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

The type of partner site you create depends on your business, your channel sales program, and the tiers within it. For example, the strategy for a hardware manufacturer with a few partners is different from that of an insurance company with a large agent network.

Try to get early answers to these questions to plan your site strategy:

- How many Partner Community licenses do I need?

  Note: If you don't need access to all sales objects, such as opportunities, leads, and campaigns, you can also use Customer Community Plus licenses for partners.

- Can I invite all my partners to the same Experience Cloud site or do I need multiple sites?
- What objects do I need to grant permissions for in my partner profiles? Do I need to three roles per account?
- What level of data visibility and privacy do I need for my site?
- Do I want to allow my partners to self-register?

For more ideas on planning your site strategy, check out this Trailhead module for Communities.

SEE ALSO:

Experience Cloud User Licenses

Migrate from a Partner Portal to an Experience Cloud Site

Salesforce recommends that you migrate from partner portals to Experience Cloud sites. Portal licenses are supported in Experience Coud sites so you don't need to switch licenses.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

> Note: Starting from Summer '13, portals are no longer available for new Salesforce orgs. Existing organizations using portals can continue to use their partner portals or migrate to an Experience Cloud site. If you don't have a partner portal, but want to share records and information with your partners, give an Experience Cloud site a try. Contact Salesforce for more information.

Why Migrate from Portals to Experience Cloud sites?

Experience Cloud sites offer all the functionality available in portals and customer portals, plus more features including:

- A rich, responsive, mobile-ready Lightning solution designed with channel sales and marketing workflows in mind: Partner Central
- Build personalized, rich experiences with your company's branding
- Collaborate with your partner users in groups and feeds
- Share files
- Access to reports and dashboards plus the ability to create custom reports for your site
- Single sign-on and login support for multiple authentication providers
- Content moderation, direct messages, and much more
- Single location where you can design, moderate, and manage your site

Plus, we're working round the clock to bring you more features in every release.

If You Continue to Use Partner Portals

All the information about setting up partner accounts, users, portals, and tracking partner sales is available in the Salesforce Partner Portal Guide.

Prep Your Org for a Partner Site

USER PERMISSIONS

To view accounts:	Read on accounts
To create accounts:	Create on accounts
To disable a partner account:	Manage External Users
To create, edit, disable, or deactivate partner users:	Manage External Users
To create contacts:	Create on contacts
To view contacts:	Read on contacts
To create, edit, and delete profiles:	Manage Profiles and Permission Sets

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

To set field-level security:	Manage Profiles and Permission Sets AND Customize Application
To set sharing rules:	Manage Sharing

You've bought your partner licenses and have partner functionality enabled in your org. You're ready to collaborate with your partners and start closing deals together. Before you actually create a partner site, work with your channel manager to create partner accounts and users, assign partner roles, and manage permissions.

At the very outset, set up the channel manager role and assign it to the internal users in your org who manage channel sales and work with partner organizations.

Channel managers with the necessary permissions can perform the next steps.

1. Each partner account is automatically assigned three partner roles.

   > Tip: We strongly recommend that you reduce the number of roles to one role: Partner User. To avoid role proliferation, it's better to use one role and grant super user access to users who need access to other users' data.

2. In Setup, type `Sharing Settings` in the Quick Find/Search box and edit the organization-wide defaults. Set the Default External Access setting to **Private** for all the objects you want to share with your partners.
3. Clone and customize the Partner User profile per your site's needs and, if necessary, grant extra permissions with a permission set.
4. Create a partner account for each partner organization you work with. Partner accounts store details about partner users and their sales data.
5. Also, plan how you want to use sharing rules to share data with partners.
6. Add users from each partner company as contacts on the respective partner account.
7. Convert the contacts on the partner account to partner users and assign a partner license, profile, and role.
8. Optionally, enable and grant super user access to partner users if you want them to view data owned by other users in their role hierarchy.
9. If you work with many partner users or don't want to deal with user management for a partner organization, consider delegating user administration.

With that, you're ready to set up a site and assign partner users to it.

SEE ALSO:

Default Organization-Wide Access Levels
Control Which Users Experience Cloud Site Users Can See

Set Up the Channel Manager Role

Channel managers are internal users who manage your partner accounts and partner users. Before setting up a partner site, identify an internal user to play the channel manager role.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Channel Manager Role

Ideally, channel managers should create all the partner accounts for the partner organizations they manage. All partner users associated with a partner account automatically fall below the channel manager in the partner role hierarchy. So all the data owned by those partner users rolls up and is visible to the channel manager.

Channel Manager Profile

Profiles determine the permissions users have, page layouts they see, the tabs and record types available to them, and other settings. Create a custom profile for channel managers or use a permission set to grant permissions to a standard profile. A few tips on what you might want to include:

Grant the "PermissionsManagePartners" permission

When this permission is enabled, channel managers can create partner accounts and partner users.

Make the following objects available to channel managers

Leads, Accounts, Contacts, Opportunities, Documents, Campaigns, Products, and any other object you plan to share with partner users in your site.

Assign record types

Assign record types to channel manager profiles. For example, the Lightning Partner Management solution includes two lead record types: one to track sales leads and the other to register deals. Make sure that your channel manager has access to both.

Make the `Partner Account` field visible to channel managers on leads, accounts, and opportunities

Channel managers can create list views or reports for tracking partner user activity.

Assign page layouts

Assign the appropriate page layouts to your channel manager profiles.

Make the `Last Transfer Date` field visible to channel managers on leads

Channel managers can create lists views or reports for tracking partner user activity.

More Tips

- Create a public sharing group for channel managers. You can use this group for filtering and controlling access to documents.
- Create a lead queue for channel managers. You can use this queue for lead assignment rules.

Create Partner Accounts

Add each company with which you partner to Salesforce as a business account. We recommend that channel managers create partner accounts so they can view all partner data.

Partner accounts are Salesforce accounts that a channel manager uses to manage partner organizations, partner users, and activities when using a partner site or partner portal. A channel manager who owns a partner account can access all the data associated with the partner account and the associated partner users.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To view accounts:
- Read on accounts

To create accounts:
- Create on accounts

To create a partner account:
- Manage External Users

> Note: The partner user role is a subordinate of the account owner's role. All data for the partner user role rolls up to the partner account owner's role. Keep in mind that if you disable a partner user, their partner user role becomes obsolete and their data no longer rolls up to the partner account role.

1. Create a business account.
2. Click **Manage External Account**, and then click **Enable as Partner**.

   The **Enable as Partner** and **Disable Partner Account** actions aren't available in the Salesforce mobile app.
3. In the confirmation dialog, select **Yes, I want to enable this account as a Partner Account**.
4. Click **Confirm**.

   > Note:
   > - If your organization has person accounts, they cannot be used as partner accounts. Only business accounts can be used as partner accounts.
   > - Partner accounts can't be deleted, but they can be disabled.
   > - To enable a partner in Lightning Experience, add the **Enable Partner User** button to the **Salesforce Mobile and Lightning Experience Actions** section on the Account and Contact page layouts.

After you create a partner account, you can add users to the account as contact records and then convert them to partner users. Partner users are Salesforce users with access to CRM objects, such as opportunities, leads, and campaigns. Partner users can access and modify the Salesforce data you share with them by logging in to a site. They can be added to account or opportunity teams.

SEE ALSO:

Add Teams to Your Accounts

Disable Partner Accounts

You can't delete partner accounts, but you can disable them. Disabling a partner account disables partner users associated with the account. We recommend disabling a partner account only if the account was accidentally enabled for site access.

If you choose to disable a partner account:

- Up to 15 active and inactive external users associated with the account are permanently disabled. You also remove them from all sites, groups, teams, permission sets, and sharing rules they're associated with.
- If there are more than 15 active or inactive external users associated with an account, you can't disable it. Disable the users before disabling the account.
- Roles and groups associated with the account are permanently deleted and not moved to the Recycle Bin.

1. Go to the account detail page for the account you want to disable.
2. Click **Manage External Account**, then click **Disable Partner Account**.
3. Click **OK** to confirm.

Warning:

If you decide to re-enable the account in the future, you can re-enable individual contacts as partner site users. Re-enabling a contact for a partner site creates a partner user record that is not associated with the previous partner user and role. You can't restore deleted roles and groups.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To view accounts:
- Read on accounts

To create accounts:
- Create on accounts

To disable a partner account:
- Manage External Users

Create Partner Users

After you create a partner account, add users to the account as contact records and then convert them to partner users. Partner users are Salesforce users with access to CRM objects such as opportunities, leads, and campaigns. Partner users can access Salesforce data when they're invited to a site.

Tip: Before creating partner users, configure your Experience Cloud site so your partner users don't log into it before it's ready.

1. View the partner account contact you want to convert to a partner user.
2. On the contact detail page, click **Manage External User** and choose **Enable Partner User**.

   Note: To manage an external user in Lightning Experience, add the following buttons to the **Salesforce Mobile and Lightning Experience Actions** sections of the Account and Contact page layouts.

   - On Accounts:
     - **Enable as Partner**
     - **Disable Partner Account**
     - **Disable Customer Account**
   - On Contacts:
     - **Enable Customer User**
     - **Enable Partner User**
     - **Enable Super User Access**

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create, edit, disable, or deactivate partner users:
- Manage External Users

To create contacts:
- Create on contacts

To view contacts:
- Read on contacts

- **Disable Customer User**
- **Disable Partner User**
- **Disable Partner Super Access**
- **Log in to Experience**
- **Log in to Portal**

3. Edit the user record for this partner and assign a partner license, role, and profile.

   Tip: You can use a Customer Community Plus license if the user doesn't require access to CRM objects, such as opportunities, leads, and campaigns.

4. Click **Save**.

After you create a partner user, you can edit the partner account and the partner user independently. Changes made to one aren't reflected in the other.

Tip: To check or troubleshoot issues with the partner user account, on the contact detail page, click **Manage External User** and choose **Log in to Portal as User**. A new browser window opens and you're logged in to the site as a site user.

Consider the following when creating partner users:

- The available profiles for the partner user are limited to the Partner User profile or profiles that have been cloned from it.
- The **Role** dropdown is read-only the first time you enable a contact as a partner or customer user for an account. The next time you enable a contact on this account as a customer or partner user, you can select a **Role** for the user.
- Unlike a standard user, the partner user role is automatically assigned based on the account name.
- The partner user role is a subordinate of the account owner's role. All data for the partner user role rolls up to the partner account owner's role. Keep in mind that if you disable a partner user, their partner user role becomes obsolete and their data no longer rolls up to the partner account role.
- Partner users and contacts can't be deleted. If you no longer want a partner user to have access to their site, deactivate the partner user.
- If you've enabled a user as a delegated administrator, note the following requirement. Before the user can create an external user, you must add at least one partner profile to the Assignable Profiles related list and assign the user the "Manage External Users" permission.

SEE ALSO:

Experience Cloud User Licenses

Partner User Profile

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

When you buy Partner Community licenses, the Partner User profile is automatically created in your org. The Partner User profile can't be modified, but you can clone it or create permission sets to specify what partner users can do.

Note: The Partner User profile is also available in your org if your organization has bought Partner Portal or Customer Community Plus licenses.

The profile you assign to partner users defines what data they can access within a site. For example, you can control whether users can view, create, or edit cases and custom object records using profiles and permission sets. You can also clone the Partner User profile and create custom profiles with varying permissions.

For each cloned profile, ensure that the "API Only User" permission is not selected. Users associated with this permission selected aren't able to log in to their sites.

Partner User Roles

USER PERMISSIONS	
To manage partner users:	Manage External Users
To create, edit, and delete profiles:	Manage Profiles and Permission Sets
To create, edit, and delete page layouts:	Customize Application
To set field-level security:	Manage Profiles and Permission Sets AND Customize Application
To set sharing rules:	Manage Sharing

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

When you enable the first external user on a partner account, a user role hierarchy is created for that account. This role hierarchy rolls up to the account owner (typically, the channel manager). The three roles in this hierarchy are Partner User, Partner Manager, or Partner Executive. When you create contacts on the partner account and convert them to external users, assign one of these roles to them.

The Partner User role rolls up to the Partner Manager role, which rolls up to the Partner Executive role. The Partner Executive role rolls up to the Channel Manager role. Partner users can view and edit all data owned by or shared with users below them in the hierarchy, regardless of the org's sharing model.

The role names include the partner account name. For example, the partner account name is Acme. The three roles created for the Acme account are Acme Partner User, Acme Partner Manager, and Acme Partner Executive. If the ownership of a partner account is changed to another channel manager, the partner user role is moved to that location in the role hierarchy.

Tip: We recommend that you reduce the number of roles to one. Grant super user access to partner users if you want them to see other partner users' data.

For large Salesforce orgs, we also recommend that you move your partner roles to a separate branch in your role hierarchy. Then, grant the partner users access to the partner account with a sharing rule. This configuration improves performance for realignment operations when there are account owner changes.

You can delete partner roles, in which case the roles are renamed to maintain the hierarchy. For example, if the Manager role is deleted from a three-role hierarchy of Executive, Manager, and User, then the Executive role is renamed to Manager. The object ID remains the same. When you create a partner role, it is automatically placed at the top as a parent. You can delete multiple roles in bulk for better performance. For example, if most of your users are assigned the User role, you can delete the Executive and Manager roles. For more information on deleting partner roles, see SOAP API Developer's Guide.

SEE ALSO:

Experience Cloud User Licenses

Set the Default Number of Site Roles

Sharing Data with Partner Users

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To manage partner users:
- Manage External Users

To set field-level security:
- Manage Profiles and Permission Sets

  AND

  Customize Application

To set sharing rules:
- Manage Sharing

Sharing groups and a sharing rule category are available by default in your org to share Salesforce data with partner users in an Experience Cloud site.

Tip: Org-wide defaults and field-level security also control data access for partners in Experience Cloud sites. Set the Default External Access setting to **Private** for all the objects you want to expose to partner users in your site.

After you buy partner licenses for your org, the following groups and sharing rule category are created:

Group or Category	Description
All Partner Portal Users group	Contains all partner users in your organization
All Internal Users group	Contains all Salesforce users in your organization
Roles and Internal Subordinates sharing rule category	Allows you to create sharing rules in which you can choose specific Salesforce users in your organization by role, including users in roles below the selected role. Partner roles are excluded.

Use these groups and the sharing rule category to easily create sharing rules that grant all Experience Cloud site, portal, or Salesforce users access to specific data.

Note: Customer Community licenses support sharing sets, but not sharing rules. And currently, sharing sets don't support objects that are associated with multiple other objects of the same type. To use such features, your community members must have the Customer Community Plus or Partner Community license. With that said, sharing set support for the Contacts to Multiple Accounts feature is available as a pilot feature.

Set Partner Username Uniqueness Requirement to the Org Level

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

You are no longer required to create a username that is different from all previously created usernames, when adding someone to an Experience Cloud site. Select **Require unique usernames for partners in this org** to contain the unique username requirement to one org and one org only. After you enable this preference, it can't be reversed.

Orgs created after Winter '19 automatically contain username uniqueness at the org level. Contact Salesforce Customer Support to enable this option in orgs created before Winter '19, then go to **Setup** > **Digital Experiences** > **Settings** to turn on this preference. Once enabled, partners are required to provide their org IDs when logging in through an API.

Note: Uploads using Data Loader, Excel Import, and Sendia are not available to partner users with this preference enabled.

Enable Leads for Visualforce Sites

If you are using the Salesforce Tabs + Visualforce template, enable leads for partner users in your Experience Cloud site so that they can access and create leads in your sites.

When you enable leads for partner users in your site, you can assign leads to those members. Also, partner users can edit leads, create leads, import leads, and mass update leads in a list view.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To enable leads for partner users:

- Manage Profiles and Permission Sets

1. Open Experience Workspaces or Experience Management.
2. Click **Administration** > **Tabs**, and add the **Leads** tab to the list of available tabs in your site.
3. In Setup, set tab visibility and object permissions. You can either set them on the profile or using a permission set. If you plan to apply these permissions selectively, we recommend using a permission set .
   a. If using a permission set, use the following settings for leads:
      - In the Tab Settings, select Available and Visible.
      - In the Object Settings, select Read, Create, and Edit.
   b. If using a profile, such as the Partner User profile, set the leads tab setting to `Default On` and enable the Read, Create, and Edit object permissions for leads.
4. Optionally, you can assign extra permissions that enable advanced features for your partners. If you plan to apply these permissions to only some of your partner users, we recommend creating separate permissions sets.

   Note: Partner users with legacy portal licenses can use these advanced features in sites, but not in portals.

Feature	Partner User Permission Needed
To import leads using the **Import Leads** link on the Leads tab in your site. If your partner user is importing leads, it might also make sense to allow them to import accounts and contacts using the **Import My Organization's Accounts & Contacts** link on the Accounts and Contacts tabs in your site.	"Import Leads" AND Optionally, "Import Personal Contacts"
To change the status of multiple leads via the **Change Status** button.	"Manage Leads"
To change the owner of multiple leads via the **Change Owner** button.	"Transfer Leads"

Assign Cases to Partners

Assign cases to partner users so they can view, modify, and update case information.

Before you assign cases to partners, ensure partners have permissions to read and update cases. You can only assign cases that you have access to.

1. On the case detail page, click **[Change]** next to the **Case Owner** field.
2. Select **Partner User** from the Owner drop-down list and enter the name of the partner user.
3. Optionally, select the **Send Notification Email** checkbox to send an email to the new owner.
4. Click **Save**.

The partner user can view and edit the case from their Experience Cloud site.

Note:

- Case comments added by partner site users are public and visible to any user that can view the case.
- You can create case assignment and escalation rules that automatically assign cases to partner users based on criteria that you define.

EDITIONS

Available in: Salesforce Classic (not available in all orgs)

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To assign cases to partners:

- Edit on cases

  AND

  Transfer Cases or Transfer Record

Assign Tasks and Events to Partners

If you have added a calendar to your Experience Cloud site, you can add events to it. Partner users with the Edit Events permission can create and edit their own events. Also, with the appropriate field-level security settings, partner users can view and create activities related to leads or opportunities.

Partner users can add tasks to leads or opportunities as reminders of particular tasks. Administrators and channel managers can view the activity history for a particular lead or opportunity, or use reports to track activities assigned to partner users. A partner user can only add tasks for or see calendars shared by:

- Other partner users assigned to the same account.
- The channel manager for their account.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To assign events to partner users:

- Edit Events

Configure an External Account Hierarchy

Set up an external account hierarchy to seamlessly share data with other external users.

You must purchase a Partner or Customer Community Plus license to use this feature.

External account hierarchies work like Salesforce role hierarchies. Account records, owned by users with roles in child accounts that are part of an external account hierarchy, share data with the parent accounts in that hierarchy. As a result, data can be shared without creating sharing rules.

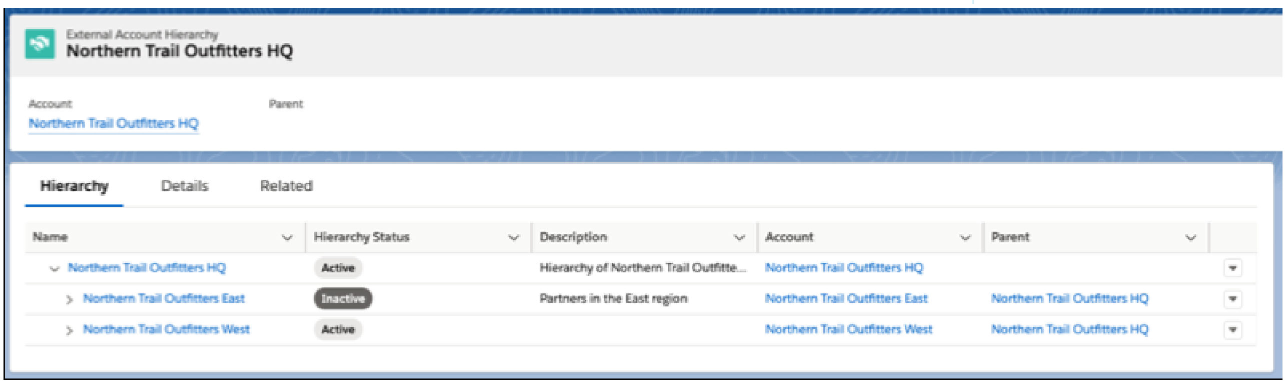
EDITIONS

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To manage external users:
- Manage External Users

To create, edit, and delete profiles:
- Manage Profiles and Permission Sets



Note: Sharing rules can work along with external account hierarchies. Data shared by sharing sets doesn't roll up in role hierarchies.

1. Go to **Digital Experiences** > **Settings** > **Enable External Account Hierarchy**.
2. After you enable this preference, the External Account Hierarchy object is available in your org.
3. Click **New** to create a hierarchy.
4. To create a level within your hierarchy, click **Add Child Account**. Then check **Activate**, to make the hierarchy active and to allow data from the child account to be shared with the parent account.
5. You can continue to build your hierarchy up to five levels deep by adding child accounts and activating the hierarchy nodes. Contact your Salesforce account executive if you need a hierarchy that's more than five levels deep.

Note the following limitations for external account hierarchies:

- Child account data is shared with the highest role at each level within the external account hierarchy.
- You can add up to five hierarchical levels in an external account hierarchy. Contact your Salesforce account executive if you need more than five hierarchical levels.
- External account hierarchies can only be used for business accounts, not person accounts.
- External account hierarchies are incompatible with account role optimization (ARO).

- Internal owners of child accounts that participate in an external account hierarchy may no longer be managers of external users in the account they own. As a result, they lose access to the records owned by those users.
- Accounts used in an external account hierarchy can't be merged with another account.
- External account hierarchies must have at least one role. If a user attempts to delete the last role in an account used in an external account hierarchy, they get an error.
- Only customer or partner accounts can use external account hierarchies. The hierarchy can contain only one type of account, either partner or customer, but not both.
- A customer or partner account can't be used in more than one active external account hierarchy.
- There's a limit of 100,000 external account hierarchy records per organization.

Grant Super User Access to a Partner User

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To enable Partner Super User Access:
- Customize Application

Super users can get insights into the records of other partner users who are at their role level or below them in the role hierarchy. Super users can access records according to their level of permissions. For example, if a manager with full access to cases is granted Super User Access, then they can view and edit cases of other managers and their direct reports. A different manager who has read-only access to cases can only view the cases of other managers and their direct reports, even as a Super User.

A few things to consider before you grant super user access to users.

- Enable Partner Super User Access in your Digital Experience settings before granting access to individual partner users.
- Partner super user access applies only to cases, leads, custom objects, and opportunities.
- Partner super users have access based on their user permissions.
-

Partner Super Users with Role	Can Access Data Owned By or Shared With
Partner Executive	– All partner users and partner super users in the same role – Manager and User roles below them in the hierarchy
Partner Manager	– All partner users and partner super users in the same role – User roles below them in the hierarchy
Partner User	All partner users and partner super users in the same role (User roles only)

- Use this information to grant super user access to users with Partner Community licenses.

1. View the contact record for the user on the partner account.
2. Click **Manage External Account**, then choose **Enable Super User Access**.
3. Click **OK**.

This grants super user access to the user with a Partner Community license. You can also grant super user access to users with Customer Community Plus licenses.

SEE ALSO:

Grant Super User Access to Customer Users

Enable Super User Access for Your Site

Optimize Account Roles to Improve Performance and Scale Your Org

Minimizing the number of roles for users with Customer Community Plus and Partner Community licenses can improve performance. Consider using account role optimization if you anticipate having a large volume of business accounts with a single Experience Cloud site user. In this scenario, all accounts with one site user owned by the same employee use a single shared person role. This optimization could replace the need for possibly thousands of account roles.

When the first role-based user with a Customer Community Plus license or a Partner Community license is provisioned for an account record, a shared person role is created. This role is used instead of your org's default number of site roles, and it rolls up to the account owner.

When a second role-based user with a Customer Community Plus or Partner Community license is added to the account, account role optimization no longer applies. Instead the account creates the org's default number of site roles. Both users are assigned to a regular site role. In a three-role hierarchy, the Executive, Manager, and User roles are created. The top-most role rolls up to the account owner.

Account role optimization interacts with Customer Community Plus and Partner Community license users independently. If an account has a single user with a Customer Community Plus license and two users with Partner Community licenses, account role optimization applies only to the user with the Customer Community Plus license. The user with the Customer Community Plus license is assigned to the shared customer site person role. Each user with the Partner Community license is individually assigned to one of the account's partner site roles. This feature doesn't affect role usage for person accounts.

Role or Community User Allocations	Allocation	Details
Total roles in an org for users with Customer Community Plus and Partner Community licenses.	50,000	This allocation includes all roles associated with users in an org who hold Customer Community Plus and Partner Community licenses. If you need more roles, contact Salesforce Customer Support and ask for a Large User Volumes assessment.
Maximum person account site users that a Salesforce user can own	50,000	Contact Salesforce Customer Support to increase this allocation.

1. From Setup, enter `Sharing Settings` in the Quick Find box and select **Sharing Settings**.
2. In the Other Settings section, enable **Use person role for first site user in partner and customer accounts**.

Review how account role optimization responds to account changes.

Change to Account	Account Role Optimization Response
Account merges	A shared person role is used when an account merge results in a single Experience Cloud site user or a single portal user (or one of each type).

Change to Account	Account Role Optimization Response
Change in account ownership	The single Experience Cloud site user assigned to the original account owner is reassigned to the new owner's shared person role.
Community user license upgraded to a role-based community user license	If the account owner doesn't already have another role-based Experience Cloud site user, a shared person role is assigned to the site user.
Contact moved to a different account	Regular Experience Cloud site roles are used regardless of whether a role-based site user exists in the new parent account.

SEE ALSO:

Sharing Considerations for Using Account Role Optimization in Experience Cloud Sites

Partner User Roles

Create Experience Cloud Site Users

Sharing Considerations for Using Account Role Optimization in Experience Cloud Sites

The combination of role-based sharing and account role optimization provides access to records and reports across accounts in Experience Cloud sites. Consider using targeted sharing access when you activate account role optimization. When an account is optimized for roles and is using role-based sharing, any role-based share for that account exposes its records to all other accounts that roll up to the same shared person role.

Note: Role-based sharing and account role optimization are available for Customer Community Plus and Partner Community licenses.

Let's look at an example.

Acme has a high volume of customer and partner Experience Cloud site accounts, and enables account role optimization to help minimize the number of Experience Cloud site roles they use. Using account role optimization Acme is able to have multiple site accounts share the same person role.

Acme has Apex sharing code that shares certain types of records based on roles. This combination of account role optimization and role-based sharing exposes these records to site users across multiple accounts in Acme's org and sites.

To address this situation, Acme reviews their Apex sharing code, triggers, and workflows. They locate every instance where record access is linked to roles, remove role-based sharing, and write code to target sharing access to specific site users.

When using account role optimization, it's best to adjust your sharing settings to share directly with account users.

Consideration	Recommendation
Using Apex Sharing Code and Apex Triggers	Review your existing Apex sharing code, triggers, and workflows, and determine if record access is linked to roles. If an Experience Cloud site user from an account that uses account role optimization must access specific records, update your Apex sharing code to target the user instead of a role. Do consider what action to take if a second user is added to the account and a new account role is created.

Consideration	Recommendation
Using Record Access on a Role	If you grant record access using a role that is associated with account role optimization, the original user loses access to the record if a second user is added to the account. An Apex trigger or workflow can prevent this from happening. **Recommendation:** Create an Apex trigger or workflow to allow the site user to retain access to records even if a second site user is added.
Sharing Records, Folders, or Reports with Experience Cloud Site Accounts	If you want Experience Cloud site account users to have access to: • records • folders • email folders • reports • dashboards • list views • dashboards it's best to use targeted sharing. If you choose to use sharing rules, don't target the shared person role. Role-based sharing grants access to all accounts that roll up to the shared person role. **Recommendations:** Create a public group and add the site user to that group. Then use the public group as the target of the sharing rule. Another option is to use manual sharing or Apex-managed sharing to share the object directly with a user. Share list views, folders, reports, or dashboards directly with account users, instead of using role-based sharing.

Use a Shared Person Account Role for Community Users

Convert single-user accounts associated with sites to use a shared person account role.

Important: If you have a large number of business accounts with a single Experience Cloud site user, we recommend enabling account role optimization for increased performance in your sites.

The PortalRole field in the User object is used to specify user roles.

1. Enable account role optimization in your org to use shared person account roles.
2. Update the role of a Experience Cloud site user to the shared person account role via Apex. This sample Apex code illustrates how to update the role of a site user, and convert the user to the shared person account role.

```
User u = new User();
u.Id = '<user id>';
```

```
u.PortalRole = 'PersonAccount';
update u;
```

SEE ALSO:

Optimize Account Roles to Improve Performance and Scale Your Org

Manage Channel Partnerships with Channel Programs and Levels

Use channel programs and levels to organize and manage channel partners. Within each program, you can group partners into levels, such as bronze, silver, and gold, and promote them based on performance. Use sharing groups, audience targeting, and sharing settings to manage access to resources based on program or level.

Organize Partner Users

- Group partners by type or geography
- Create levels within each program that organize partners by position or rank
- Add or remove members from channel programs or levels using groups
- Promote or demote users by changing group membership

Manage Access to Resources

- Use audience targeting to create different versions of a page with criteria fields specific to each program level
- Use the criteria fields for audience targeting to assign visibility to certain components or branding sets
- Set organization-wide defaults and sharing settings to control access to Channel Program Level and Channel Program Member objects
- Offer incentives to different levels, such as market development funds, to motivate partner users to meet Key Performance Indicators(KPIs)

Track Individual Performances

- Measure partner users' performances, and establish benchmarks for their channel programs
- Customize partner scorecards so that you get the report summary results that channel account managers or executive teams wants to see
- Add multiple scorecards for tracking different categories

SEE ALSO:

Considerations for Using Audiences

Market Development Funds

Track Performance with Partner Scorecard

Manage Channel Program Members with Sharing Groups

Create a Channel Program

Channel programs help channel managers organize multiple-channel sales organizations. Managers can create programs for different types of partner users, like Resellers, Value Added Resellers (VARs), Distributors, and Managed Service Providers (MSPs). They can also organize partner users based on geography or level of expertise.

Channel Programs are available to users with Partner Community licenses.

Create a channel program to provide partner users access to leads within their region, relevant marketing events, and relevant resources. If a partner user joins a team, you can add them to a channel program by making them a channel program member. You can add or remove channel program members from a channel program at any time.

Tip: Enable feed tracking on the Channel Program Member object to easily track partner activity, such as when a member changes to a different level. Be sure to add the Name column to the Channel Program Member related list. You can use the name to navigate to a member's feed.

1. From the App Launcher, find and open **Channel Program**.
2. Click **New** and enter a name, category, and description.
3. Activate the Program.
4. Save the channel program.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create channel program

- Create on channel program

Create Channel Program Levels

Motivate partner users to meet Key Performance Indicators (KPIs) using program levels. Create multiple levels within a program, and assign each partner user to a level that is based on their performance. Different levels can offer different incentives. For example, the Gold level can provide access to market development funds, which can be used to help the partner make more sales. Channel program members assigned to the Silver level can work toward the Gold level to gain access to market development funds.

Channel Programs are available to users with Partner Community licenses.

EDITIONS

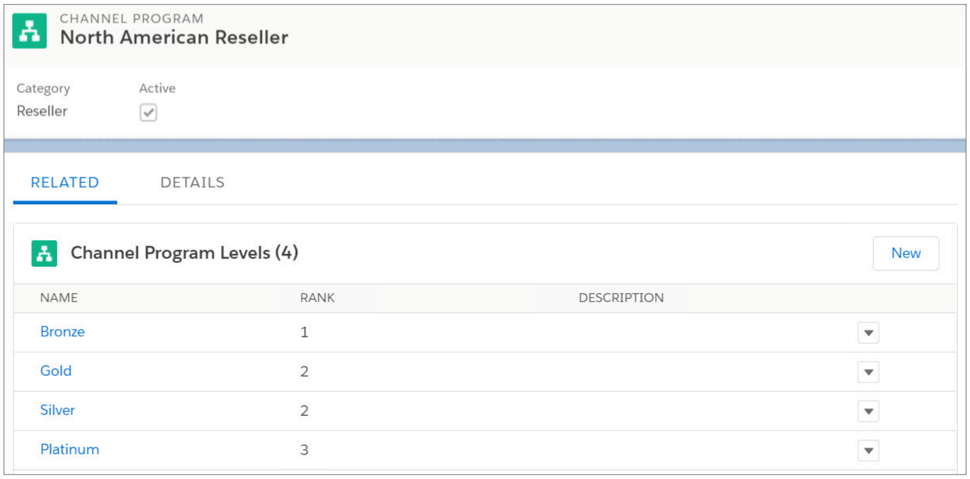
Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create channel program level

- Create on channel program level



Note: The My Channel Program list view shows levels of channel programs owned by and shared with a user.

Channel program levels help you organize members of a program into groups that are based on their performance and share different resources with different groups.

1. From the App Launcher, find and open **Channel Program Levels**.
2. Click **New** and enter the name, channel program, rank, and a description.
3. Save the channel program level.

Manage Channel Program Members with Sharing Groups

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Use sharing groups to manage Channel Program members. When new partner users join a team, you can add them to a Channel Program Member group. You can also move partner users to another group when they are promoted, demoted, or transitioned to a different area of expertise.

You can also use Channel Program Member sharing groups to manage access to resources within levels, such as public queues, list views, sharing rules, and folders.

Note: Deleting a partner account that was added as a channel program member, deletes the associated channel program member. Undeleting the partner account brings back the account and the channel program member, but the account is no longer enabled as a partner account.

Tip: Org-wide defaults and field-level security control data access for partner users in channel groups. Set organization-wide default to **Private** on Channel Program Level and Channel Program Member objects. Grant each partner user access to their level and member records to ensure that they have visibility into their accounts and opportunities.

Channel Program Member Limits

Add up to 50,000 channel program members per organization.

Contact Salesforce Customer Support to increase the number of channel program members in your organization beyond the current limit.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Account Relationships and Account Relationship Data Sharing Rules

Account relationships and account relationship data sharing rules give you granular control over how account information is shared. They allow you to share object records related to an account, such as cases, opportunities, and contacts. The shared records don't have to be owned by a user of that account, they just have to be associated with it. You can also determine the access level granted, such as read or write.

Account relationship data sharing rules allow you to define the criteria that are used to share object records with an external account. The data sharing rule defines the relationship type, the information that is shared, and the record access given to the account that is gaining access.

Once you've created your data sharing rule, you can use it to share data with an external account by creating an account relationship. The account relationship comprises the account that is sharing information, the account that is accessing those records, and the type of relationship they have.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Go to **Digital Experiences** > **Settings** and select **Enable Account Relationships** under **Account Relationship Settings**.

SEE ALSO:

Configure Account Relationship Data Sharing Rules
Create an Account Relationship
View Shared Account Records in Your Experience Cloud Site
Considerations When Using Account Relationships and Data Sharing Rules

Configure Account Relationship Data Sharing Rules

After account relationships are enabled, set up an account relationship data sharing rule. This rule defines the relationship type, the type of information shared, and the record access granted.

Enable Account Relationships to use this feature. Once you enable account relationships in your org, you can't disable it.

The following fields define your sharing rule:

Field Name	Description
`Name`	The name of your sharing rule. We suggest that you use something that describes the rule, such as *Lead Sharing for Vendors*.
`Developer Name`	API name.
`Description`	A summary of the sharing rule. We suggest that you include information in this description about Object Type, Account Criteria To Field, Account Relationship Type, and Access Level.
`Account Relationship Type`	This field defines the type of relationship between the accounts that are sharing records. This field also associates the account relationship data sharing rule with the account relationship. If the Account Relationship Type picklist doesn't contain a value that you need, you can create a picklist value from the Account Relationship object definition page.
`Access Level`	The level of record access granted to the account that is receiving the information. Read and Write are the only access levels available.
`Object Type`	The records of the object that you are sharing.
`Account To Criteria Field`	The field that determines how object records are shared. Use only owner and account lookup fields.
`Advanced Formula`	Static formula criteria that can be applied to the data sharing rule to further refine how objects are shared. When creating your static formula criteria, be sure to use the API name for any object fields that you include in the formula.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create and manage Account Relationship Data Sharing Rules:
- Create and Set Up Experiences

  AND

  You must be a member of the site

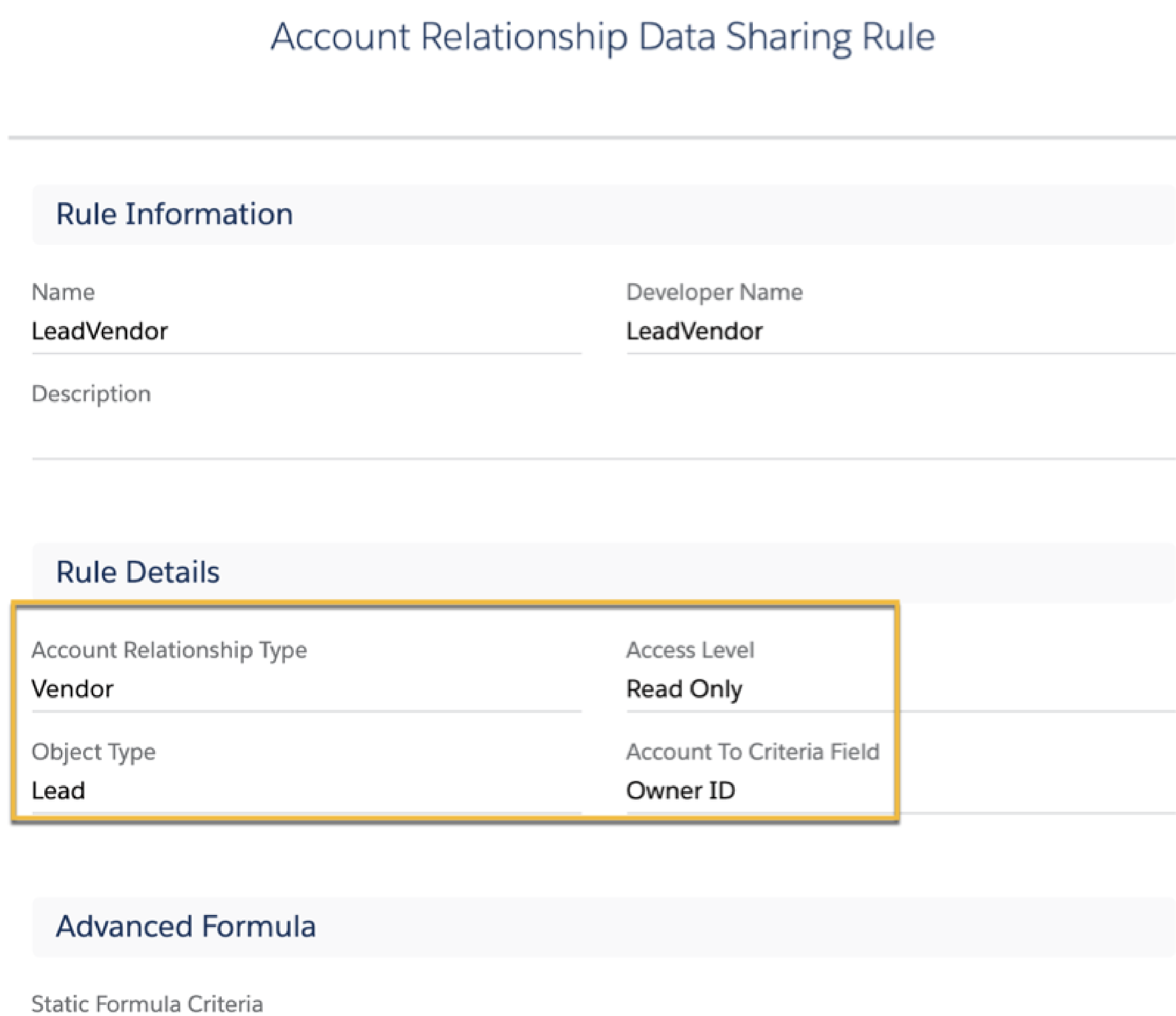
Object Type and Account To Criteria Fields, on the account relationship data sharing rule, determine which data is shared and how it's shared. Account relationship data sharing rules can apply to; accounts, campaigns, cases, contacts, custom objects, leads, opportunities, orders, partner fund allocations, partner fund claims, partner fund requests, and partner marketing budgets.

1. From Setup, enter *Digital Experiences* in the Quick Find box. Select **Digital Experiences**.
2. Click **Settings**.
3. Check **Enable Account Relationships** and save your changes.
4. Go to **Setup** and enter *Account Relationship* in the Quick Find box, then click **Account Relationship Data Sharing Rule Settings** > **New**.
5. Enter the same value in the Account Relationship Type field as the account relationship that is using this rule.

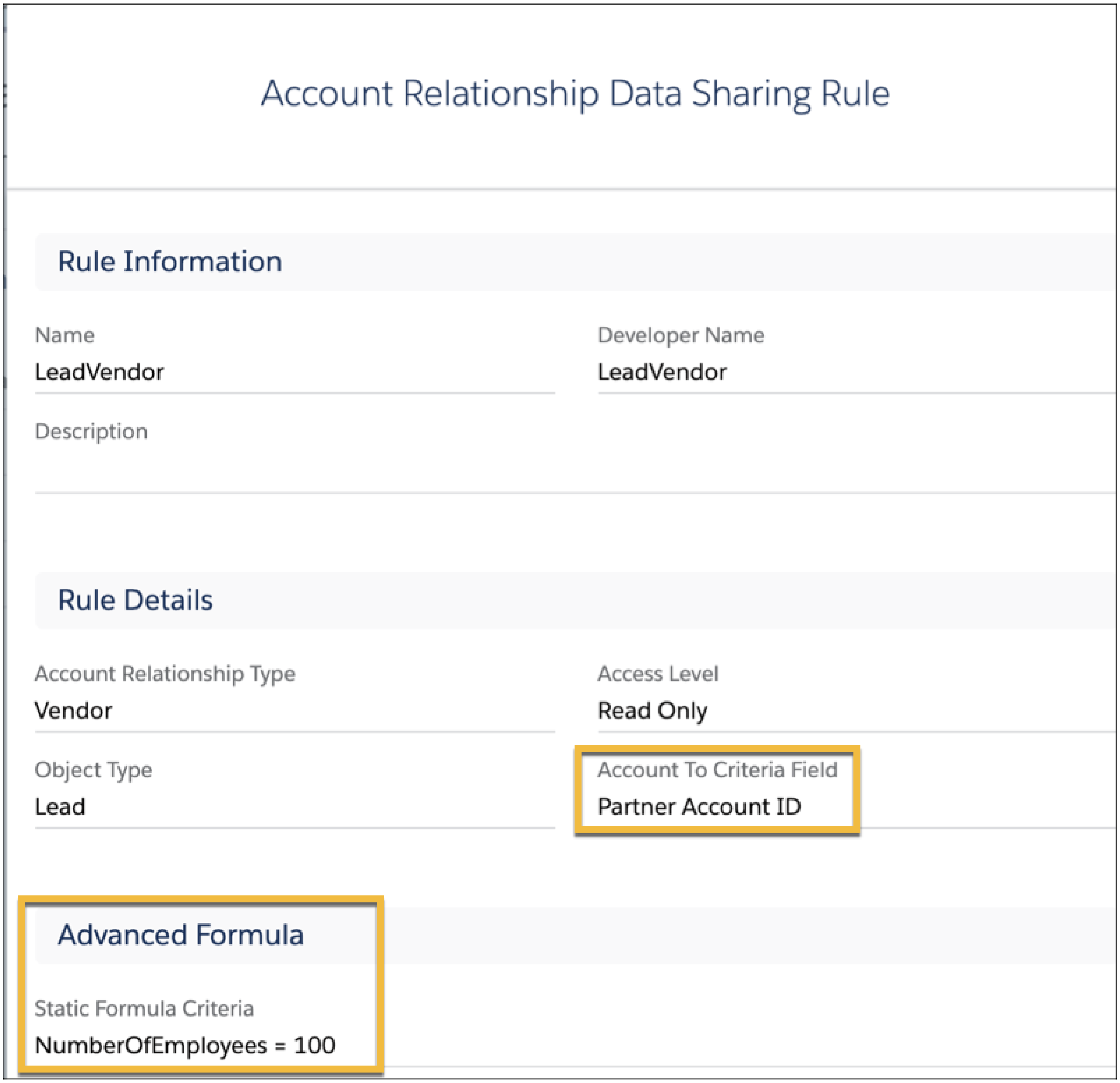
6. Specify the type of access the account being shared with (Account From) gets to the sharing account's (Account To) data, in the Access Level field.
7. Search for the type of object that is being shared in the Object Type field.
8. Note: Custom lookup fields can be used in the Account To Criteria Field as long as they look up to a user or an account. If they look up to a user, then the rule applies to the specified object's records owned by the Account To's portal users. If it looks up to an Account, then the rule applies to the object's records with the Account To name listed as their account.

   Use the lookup field to select how the object is shared. For example, if Account To wants to share only their partner users' owned leads with Account From, use Owner Id in Account To Criteria Field. If Account To wants to share all their account's leads, the Account To Criteria field value is Partner Account Id.

Example: To share all leads owned by external users of Northern Trail Outfitters with Cloud Kicks, enter the following rule. Notice that the Account To Criteria Field value is Owner Id.



Let's say you want to share leads that have Northern Trail Outfitters listed as the Partner Account Id and who have 100 employees. Change the Account To Criteria Field value to Partner Account Id and enter the advanced formula, NumberOfEmployees = 100.



Note: The following field types are restricted for static criteria fields:

- Formula
- Roll-Up Summary
- Currency
- Custom Data Type
- Text Area (Long)
- Picklist (Multi-Select)

- Standard (Id)
- Text (Encrypted)
- Custom and Standard Lookup fields that aren't required

Warning: Changing the data type of the custom fields that have been entered in the static criteria formula can corrupt your account relationship data sharing rule.

Create an Account Relationship

Once you've created an account relationship data sharing rule, assign it to an account relationship to begin sharing.

The following fields define the account relationship:

Field Name	Description
`Name`	The name of the account relationship. We suggest including both account names and the type of relationship they have.
`Account From`	The account that is gaining access to another account's data.
`Account To`	The account that is giving access to their records to another account.
`Account Relationship Type`	This field defines the type of sharing rule this account relationship can access. It is the field that associates the account relationship to the account relationship sharing rule. If the Account Relationship Type picklist value that you need is not available, go to the Account Relationship Type field definition page on Account Relationship object Settings page and create a picklist value.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

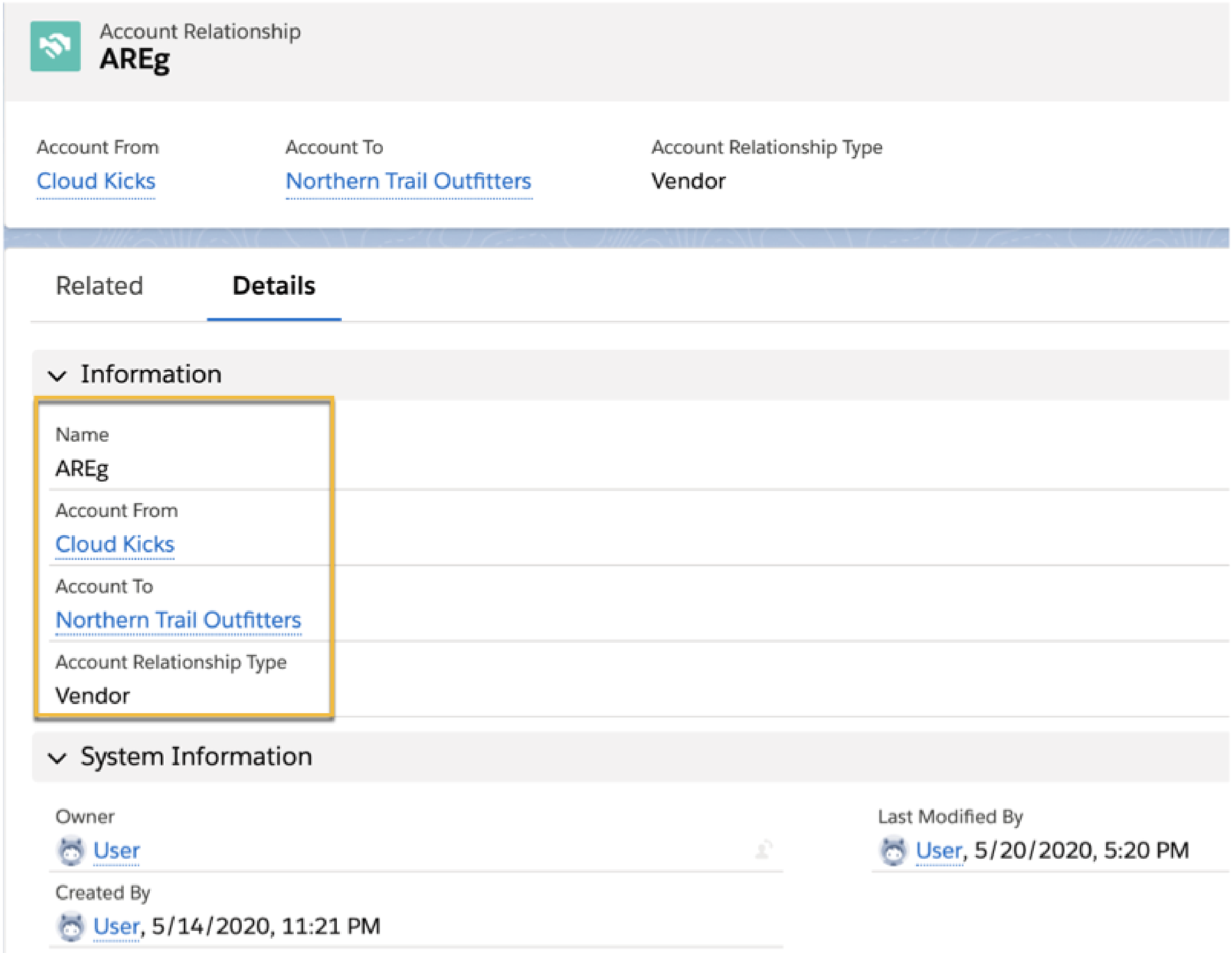
To create and manage Account Relationships:
- Create and Set Up Experiences

  AND

  You must be a member of the Experience Cloud site

1. To view the accounts that are sharing data, add the Account To and Account From related lists to the Account page layout.
   a. From Setup, enter *`Account`* in the Object Manager Quick Find box.
   b. Go to **Accounts** > **Page Layouts** > **Account Page Layout**.
   c. Click **Edit** and go to the Related List tab.
   d. Drag Account To and Account From related lists to the Account page layout.
   e. Save your changes.
2. Go to a partner account, scroll to the **Account Relationship** related list, and click **New** to create an account relationship.
3. Enter the account who is sharing their data in the Account To field. Enter the account that is gaining access to the data in the Account From field. The Account Relationship Type value must match the Account Relationship Type value in the account relationship data sharing rule.

Example: If Northern Trail Outfitters wants to share their leads with Cloud Kicks, they would create the following account relationship.



View Shared Account Records in Your Experience Cloud Site

Once an account relationship data sharing rule is in effect, the shared information filters into the object list view of the account gaining access (Account From).

Partner Community or Customer Community Plus licenses are required to access Account Relationships and Account Relationship Data Sharing Rules.

To display this information on your partner site:

- Go to **Experience Builder** click **Navigation Menu** > **Edit Default Navigation**. Click **Add Menu Item** and enter the name of the object you are sharing, Object Type, and enter the list view you created as the default list view.

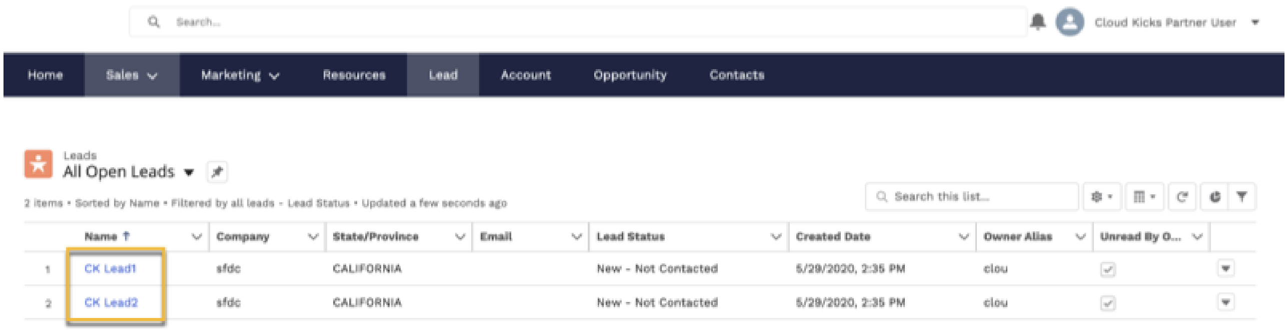
1. Create a list view for the shared object with the appropriate filters and give it a recognizable name, such as `All Open Leads`.
2. Go to **Experience Builder** click **Navigation Menu** > **Edit Default Navigation**. Click **Add Menu Item**.
3. Enter the name of the object you are sharing, Object Type, and enter the list view you created as the default list view.

EDITIONS

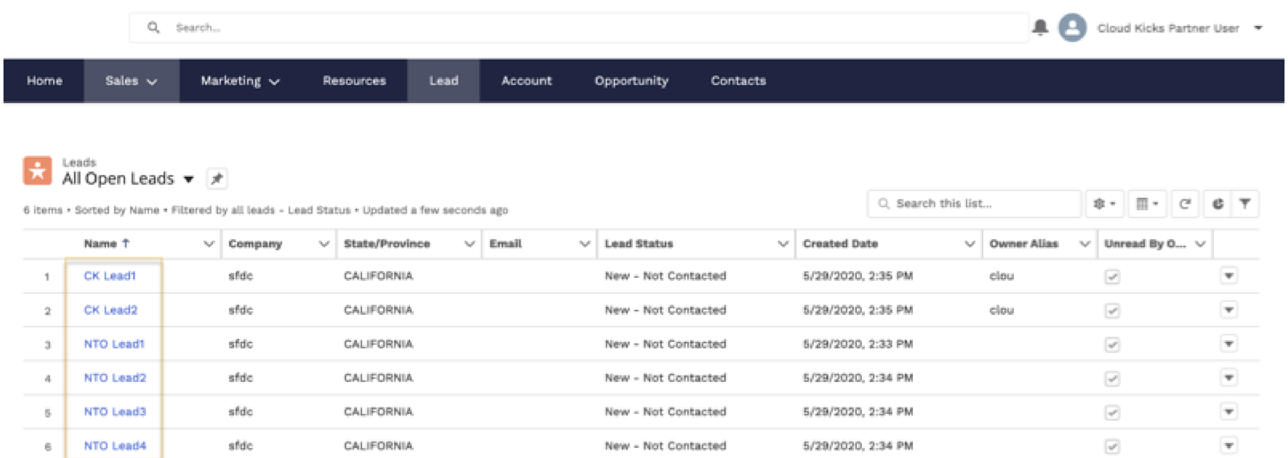
Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Example: Before a partner account relationship was created, Cloud Kicks didn't have access to Northern Trail Outfitters leads.



Once the rule is applied, the leads that Northern Trail Outfitters shares with Cloud Kicks appear under Cloud Kicks All Leads list view.



Create Reports for Account Relationships

Create a custom report using the Account Relationship object to track your account relationships. Once you've created the report, share your information in a dashboard.

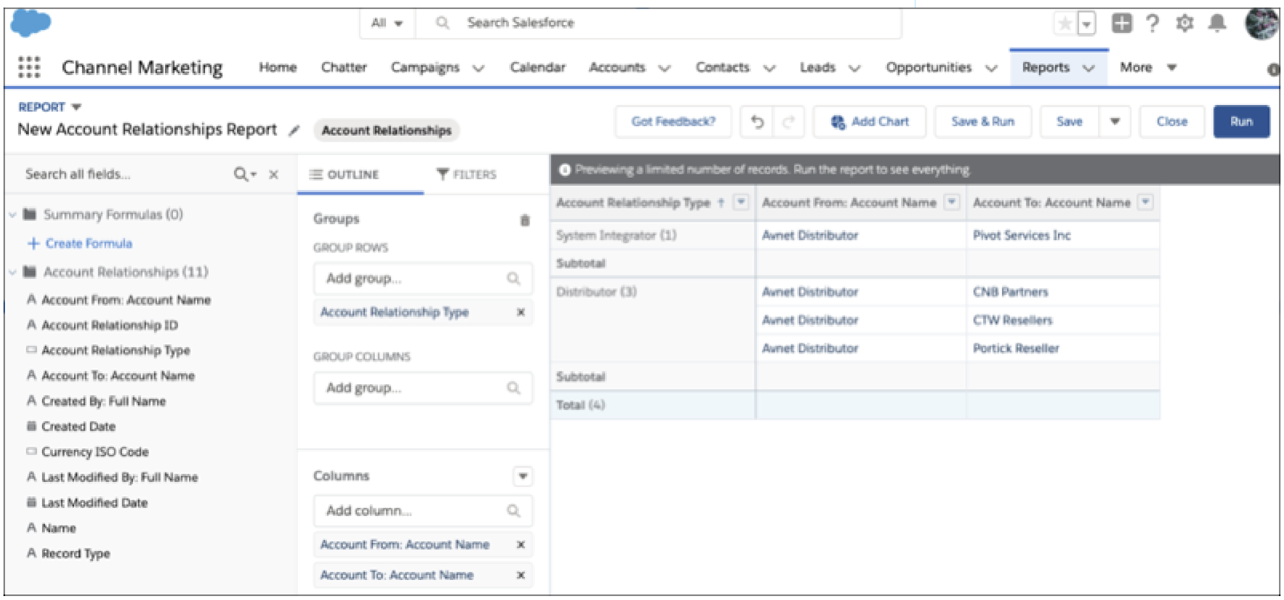
1. Create a custom report type. Select **Account Relationships** as the primary object.
2. Build your report and save it.
3. Share the report on a dashboard.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Example: Once you've created a custom report type using the Account Relationship object, you can build your report to fit your needs.



Considerations When Using Account Relationships and Data Sharing Rules

There are a few important things to keep in mind when you use account relationships or account relationship data sharing rules.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

- Sharing Rules follow our standard sharing rule procedures and aren't the same as account relationship data sharing rules. Sharing rules allow you to provide visibility to objects. Account relationship data sharing rules share specific object records with an external account if an account relationship is created. Deferred sharing rules don't affect account relationship data sharing rules.
- Account Relationship Types are dynamic picklist values. If the value you need isn't available, go to **Setup**, open the Object Manager tab, and enter `Account Relationship` in the quick find box. Click **Account Relationship** > **Fields & Relationships** > **Account Relationship Type** and select **New** under AccountRelationshipType Picklist Values. You can also customize an existing value. You can't replace, delete, or deactivate an Account Relationship Type picklist value used in an account relationship or account relationship data sharing rule.
- After an account relationship is saved, only its name can be updated. To make further changes, delete the account relationship and create a new one.

- Only one sharing rule can contain the same Account Relationship Type and Object Type field values. For example, you can only have one sharing rule that combines the Lead.OwnerId Object Type field value and "Distributor" Account Relationship Type field value.
- An account that is part of an account relationship can't be deleted or merged.
- If sharing isn't enabled for orders, then you can't create account relationship data sharing rules for them.
- Unmanaged packages with Namespace enabled can't contain account relationship data sharing rules that include custom objects.
- Account Relationship don't share data that is owned by a queue.
- Account relationships can't share data with accounts that use account role optimization.
- Account relationships don't share data from High Volume Portal Users.

Best Practices for Account Relationships

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Looking for best practices and use cases to help you get the most out of your account relationships and account relationship sharing rules? You've come to the right place.

Account relationships only share data with Partner or Customer Community Plus users. Keep the following in mind when you use account relationships to share data:

- If possible, load your data before you set up account relationship data sharing rules. Loading data after you create account relationships and account relationship data sharing rules activates the sharing rules. Performance can be affected if large quantities of data is loaded after the rules are created. If it's necessary to load data after account relationship data sharing rules have been created, load no more than 1 million records per day.
- Create the account relationship before creating account relationship data sharing rules.
- Avoid bulk Contact reparenting operations.
- Limit updates to account relationship data sharing rules that are being used by multiple account relationships. Recalculating account relationship data sharing rules for many records can take some time. If updates to active account relationship data sharing rules are necessary, space them out to avoid performance issues. Also shared data may not be immediately available after you make the updates.
- For optimal data processing, position users who own many records at the top of an external role hierarchy.
- Before you put your account relationship data sharing rules into production, test them in a Sandbox.

When you create account relationships, keep the following Salesforce limitation in mind:

- Salesforce has a recommended limit of 50 million records for custom objects.

Tip: If you're loading more than 10 million records, contact your account executive before loading. We can help monitor your progress and assist you.

Lead Distribution and Deal Registration

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Experience Cloud sites provide an incredibly robust and flexible set of tools to manage both inbound and outbound leads. Use Partner Central to implement lead distribution, lead monitoring, and deal registration with a few clicks of a button.

Lead distribution is the practice of managing and maturing both inbound and outbound sales leads with channel partners who are selling on your behalf. Many companies sell their products through partners. With the lead distribution process, companies source leads and pass them to their partners for follow-up and sales. Lead distribution is also known as lead pass.

Other companies rely on their partners to source leads and register them with the company. This process is known as deal registration. The channel manager checks in the Salesforce org to make sure that the submitted lead does not create channel conflict with other partners.

IN THIS SECTION:

Assign Leads to Partners

You can assign leads to partners or allow partners to drive their own lead queue.

You can:

- **Directly assign leads**: Assign each lead to an individual partner user.
- **Configure lead distribution**: Assign leads to a lead queue and allow partner users to claim leads from the queue. The native Partner Central Experience Cloud site template provides the lead inbox component that you can use to pass leads to partners. Use lead assignment rules to automatically assign leads to partner users or queues based on certain properties of those leads.

  Note: User actions in a site don't trigger assignment rules.

- **Configure deal registration**: Allow partners to submit qualified or mature leads to get ahead of competitors.

Assigning a lead to a partner user or partner lead queue is just like assigning a lead to any other user or queue. Leads assigned directly to a user or a queue that is not part of the lead pool are shown on the site's Leads page or tab. The partner user can see leads by selecting the appropriate list view. Until a partner user has reviewed a lead, it displays in bold, and is in the My Unread Leads list view.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To assign leads to partner users:
- Edit on leads

Configure Lead Distribution in Partner Central

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Automatically pass on leads acquired from your web site, marketing campaigns, or referral programs using lead distribution. Partner Central lets you share a common pool of leads with your channel partners on a partner site using the lead inbox.

While companies can choose to configure lead distribution in multiple ways, one approach is to create a shared queue and list view of leads, and use assignment rules to automatically pass leads to partners in the lead inbox. Use Salesforce CRM capabilities such as lead page layouts, lead record types, and assignment rules to automate the process. Partner users can accept the leads they're assigned from the lead inbox in the partner site.

Configure lead distribution for your partner site for:

- Automated routing of company-sourced leads to channel partners
- Criteria-based lead assignment
- Increased likelihood of lead conversion
- Automated handling of dead or dormant leads

Configuring lead distribution for your Partner Central site involves the following steps.

IN THIS SECTION:

Create a Lead Process for Lead Distribution

A lead process allows you to define or customize status values or stages for leads.

Create a Queue for Lead Distribution

Create a shared queue of leads and add partners to the queue. A queue is a special type of list view that you can quickly share with multiple users, groups, and roles. In fact, creating a queue automatically creates a list view in your org. Queues and their corresponding list views both have visibility settings that allow you to share contents with partner users in your Experience Cloud site.

Create Page Layouts for Lead Distribution

Use page layouts to control field visibility and behavior for different types of users and sales processes. There are likely fields on the deal registration that the company may not wish to expose to partners.

Create Lead Record Types for Lead Distribution

Create a lead record to track sales leads that you pass to partner users. Record types help you differentiate between sales leads and registered deals, assign specific page layouts for different processes, and simplify reporting for each type of record.

Create Assignment Rules for Lead Distribution

Assignment rules allow you to automatically apply criteria to sort, queue, or act on leads. For example, use assignment rules to automatically assign leads to the lead inbox queue for Partner Central.

Customize Partner Central for Lead Distribution

Partner Central comes predesigned to support lead distribution. Verify that the Lead Inbox component works with your lead queue and list view and test the lead distribution process.

Create a Lead Process for Lead Distribution

A lead process allows you to define or customize status values or stages for leads.

Create a process called Lead Distribution and define the statuses that the lead can be in. When you select status values for a process, think of all the stages a lead goes through in the process.

Tip: To use more values than the master process record provides, customize the Lead Status picklist values for leads before you create the lead process.

1. From Setup, enter `Processes` in the Quick Find box.
2. To create a lead process, such as for lead distribution, select **Lead Processes**.
3. Select the stages best suited to the lead and your business needs.
4. Save the process.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create processes:

- Customize Application

Create a Queue for Lead Distribution

Create a shared queue of leads and add partners to the queue. A queue is a special type of list view that you can quickly share with multiple users, groups, and roles. In fact, creating a queue automatically creates a list view in your org. Queues and their corresponding list views both have visibility settings that allow you to share contents with partner users in your Experience Cloud site.

1. From Setup, enter `Queues` in the Quick Find box, then select **Queues**.
2. Create a queue to queue leads for the lead inbox. Let's call this Lead Inbox Queue or an intuitive name of your choice.
3. On the queue detail page, under Queue Members, add the partner users you want to pass leads to. You can set the visibility settings by profiles, roles, or users.
4. Save the queue, which also creates a list view by the same name.
5. Next, go to the Leads object home in your org. From the Views drop-down list, select the list view with the same name as the queue and edit the list view.

   Note: You can't edit list views in Lightning Experience.

6. In the Step 4: Restrict Visibility section, set visibility preferences. For example, to share the queue with all partners, search by and share the list view with the All Partner Users group and save.

In Partner Central sites, you can select this list view to display in the lead inbox in your site. You can create and share multiple queues and the corresponding list views with partner users. Partner users with permissions to access leads, queues, and the corresponding list views can see all lead list views and switch between them.

SEE ALSO:

Create Queues

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create and change queues:

- Customize Application

  AND

  Manage Public List Views

To change lead list view visibility:

- Read on leads

  AND

  Create and Customize List Views

To create, edit, or delete public list views:

- Manage Public List Views

Create Page Layouts for Lead Distribution

Use page layouts to control field visibility and behavior for different types of users and sales processes. There are likely fields on the deal registration that the company may not wish to expose to partners.

Create two page layouts: one for the channel manager and partner profiles in your partner site.

1. From Setup, enter `Leads` in the Quick Find box, then select **Page Layouts** under Leads.
2. Create a lead page layout for partner users by cloning the master lead layout. Let's call this **Lead Distribution - <User Profile>**.
3. Modify the page layout to add, remove, or modify the behavior of fields, action buttons, related lists, and layouts based on who the layout is for. Typically, channel managers see more data than partner users.
4. Save the page layout.
5. Repeat for channel manager profiles.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create or customize page layouts:
- Customize Application

Create Lead Record Types for Lead Distribution

Create a lead record to track sales leads that you pass to partner users. Record types help you differentiate between sales leads and registered deals, assign specific page layouts for different processes, and simplify reporting for each type of record.

Note: Creating a lead record type requires a lead process and a lead page layout.

Lead distribution is used for managing outbound leads that your company passes to your partners. Deal registration, on the other hand, allows partners to submit leads early on so they can get ahead of their competition. Both channel managers and partner users see both lead record types, but channel managers typically require more visibility and control over the data. Define lead page layouts with both channel managers and partner users needs in mind. You can assign page layouts to profiles for each lead record type you create.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

1. From Setup, enter `Leads` in the Quick Find box, then select **Record Types** under Leads.
2. Create a record type to track leads you pass to partners for lead distribution. Let's call this **Sales Lead**.

   For deal registration, create a separate record type called **Deal Registration**.
3. Activate the record type and assign it to the appropriate partner and channel manager profiles for your site.
4. Assign page layouts for the partner and channel manager profiles.
5. Edit the picklist values for the Lead Source record type. Include values that let you track inbound leads from deal registration (from partners) separately from outbound sales leads (passed to partners).

Create Assignment Rules for Lead Distribution

Assignment rules allow you to automatically apply criteria to sort, queue, or act on leads. For example, use assignment rules to automatically assign leads to the lead inbox queue for Partner Central.

For lead distribution, use assignment rules to define the criteria by which you want to distribute your leads, such as partner tier, geography, or specialization.

1. From Setup, enter `Leads` in the Quick Find box, then select **Lead Assignment Rules**.
2. Create a lead assignment rule, let's call this All Channel Sales Leads.
3. Create rules to filter leads by record field values or user criteria and assign them to the lead inbox queue.

   You can also create rules to directly assign leads to partner users.
4. To send an email notification when a lead is assigned to the queue, select an email template.

   You can also create custom templates for partner email notifications.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: Salesforce **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Note: Assignment rules that run after, rather than during, lead creation can't include the Campaign field in their criteria.

Customize Partner Central for Lead Distribution

Partner Central comes predesigned to support lead distribution. Verify that the Lead Inbox component works with your lead queue and list view and test the lead distribution process.

1. In your Partner Central site, go to the Home page in Experience Builder.
2. Click the Lead Inbox component and select the lead list view you want to display and link to. Configure other properties in the Property Editor.
3. To save your changes, publish the site.
4. Log in as a partner to test the lead distribution process.
   - Create a few test leads that match the assignment rules for the lead queue.
   - Make sure that the leads show up in the lead inbox queue and list view.
   - Accept a lead. Accepting a lead makes the partner the owner of the lead.
   - Verify that the lead shows up in the partners list view.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Configure Deal Registration in Partner Central

Deal registration programs involve resellers registering deals with their vendor. Vendors in turn provide extra margins to the reseller for providing early pipeline visibility for these deals and keeping out competitors. Once a deal is registered, other resellers or your direct sales team can't compete for the registered deal.

Configure deal registration to:

- Automate the submission & approval process
- Increase partner competitiveness and participation
- Provide incentives to partners for leads they convert quickly
- Get early visibility into your pipeline
- Manage channel conflict

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

- Monitor channel revenues both within your Experience Cloud site and in Salesforce

Here's a summary of how to configure deal registration in your Partner Central site.

IN THIS SECTION:

Create Processes for Deal Registration

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create processes:
- Customize Application

A process allows you to define or customize the stages in the sales process for leads or opportunities.

When you select status values for a process, think of all the stages a lead or an opportunity goes through. For example, for deal registration, the Lead Status values could be New, Submitted, Approved, Rejected.

Create a process for leads. Create a separate process for opportunities.

> Tip: To use more values than the master process record provides, customize the Lead Status picklist values for leads before you create the lead process. Also, add the Deal Registration to the Lead Source picklist values.

1. From Setup, enter `Processes` in the Quick Find box.
2. To create a process for leads, select **Lead Processes**. To create a process for opportunities, select **Sales Process** under Opportunities.
3. Select the stages best suited to the lead or opportunity and your business needs.
4. Save the process.

Create Page Layouts for Deal Registration

Use page layouts to control field visibility and behavior for different types of users and sales processes. There are likely fields on leads that you might not want to expose only to channel managers and not partners.

Create two page layouts: one for the channel manager and partner profiles in your partner site.

1. From Setup, enter `Leads` in the Quick Find box, then select **Page Layouts** under Leads.
2. Create a lead page layout for partner users by cloning the master lead layout. Let's call this **Deal Registration - <User Profile>**, or specifically, Deal Registration - Partner Users.
3. Modify the page layout to add, remove, or modify the behavior of fields, action buttons, related lists, and layouts based on who the layout is for.

   Tip:

   - Extend the Lead Source picklist values to indicate which leads are submitted by partners as deals.
   - Add a custom, auto-numbering field called `Deal ID` to both partner and channel manager page layouts. You can use this field value as a separate identifier for deals, in both leads and opportunities.
4. Save the page layout.
5. Repeat for channel manager profiles.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create or customize page layouts:

- Customize Application

Create Lead Record Types for Deal Registration

Create a lead record type to track deals submitted by partners in Experience Cloud sites. Record types help you differentiate between sales leads and registered deals, assign page layouts for each profile for deal registration, and simplify reporting by lead record type.

Note: Creating a lead record type requires you to associate it with a lead process and allow you to specify page layouts to be used with different profiles. Similarly, creating an opportunity record type requires you to provide a sales process and opportunity page layouts.

1. From Setup, enter `Record Types` in the Quick Find box, then select **Record Types** under Leads. To create an opportunity record, select **Record Types** under Opportunities.
2. Create a lead record type to track registered deals called **Registered Deal**. If you're creating an opportunity record type, create one for registered deals as well.
3. Activate the record type and assign it to the appropriate partner and channel manager profiles for your site.
4. Assign page layouts for the partner and channel manager profiles.
5. If you haven't already, edit the picklist values for the Lead Source field to include a value for registered deals.

If this is the first time you're setting up a deal registration process for your company, consider converting existing leads to the generic sales lead record type. Using separate record types for standard leads versus registered deals simplifies the reporting process.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Create a Global Action to Let Partners Register Deals

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Create a global action to allow partners to register deals from Experience Cloud sites. Partner Central comes with a Quick Create button that you can add the global action to so partners can register deals.

1. From Setup, enter `Global Actions` in the Quick Find box, then select **Global Actions**.
2. Create a global action, select **Lead** as the target object, and the record type for the deal registration process.
3. Select or specify an appropriate label for the global action. This label displays in the Create button menu in your site.
4. Fill out the other details and save the global action.
5. Customize the fields in the global action layout, based on the information you want your partners to submit for each deal.

Tip: Use a Lead Source value to indicate that the lead has been captured from the Deal Registration process.

Customize Opportunities for Deal Registration

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Create an opportunity process, page layout, and record type, similar to leads.

Many companies create separate sales processes for their direct and indirect sales opportunities. Some companies prefer to expose a shorter list of opportunity stage values that are less granular compared to stages used by their direct sales team.

1. Create an opportunity process.
2. Create two opportunity page layouts, one for partner users and one for channel managers.
3. Create an opportunity record type to track registered deals, different from the opportunity record type you use to track direct sales opportunities.

   Tip:

   - Many companies struggle with how to report on channel versus internal sales. Using separate record types to categorize opportunities by who is working on them—internal sales teams or partners—allows you to report on direct and channel sales separately.
   - Make this opportunity record type the default for partner users. This ensures they see the same record type when the opportunity is converted, regardless of who does the conversion.
   - Add the Deal Registration value to the Lead Source picklist values for the opportunity record type.

4. Map any custom fields on the lead record type to the opportunity record type for deal registration.

Create Approval Workflows for Deal Registration

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create processes:
- Customize Application

Approval workflows are unique to each organization's sales needs and business processes.

Approval workflows should account for how you want to route submitted deals, how you want to filter and evaluate them, and what notifications you want to send out. A few guidelines for planning your approval workflows:

- **Email Templates**: Create email templates for each stage of the approval process that you to send notifications for.
- **Routing**: Screen leads by record type and submit all registered deals for approval.
- **On Submission**: Identify what field values change on the lead record on submission, for example the lead status. Decide if the lead record must be locked until it is approved or rejected.
- **Evaluation**: Decide what qualifies a submitted lead to be considered for deal registration. Determine any thresholds, filter criteria, and stages you want to filter by.
- **Approval**: Decide who to route the submitted deal to. Typically, this is the channel manager. Decide what happens on approval.
  - Change the Lead Status to approved.
  - Convert the lead to an opportunity.
  - Send an email notification to the partner user.
  - Set a deal expiration date and save the deal approval date for reporting.
  - Extend any margins or discounts that you might offer to the partner on successful closure.
- **Rejection**: Decide what criteria disqualify a lead. Set the Lead Status to rejected. Send an email notification to inform them of the rejection. Unlock the lead record so partners can modify and resubmit if necessary.

For detailed instructions, see the approval workflow documentation in the Salesforce Help

Customize Partner Central for Deal Registration

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Partner Central comes predesigned to support deal registration. Use the Quick Create button to share a global action to submit registered deals. The template contains lead and deal list views for partner users.

1. In your Partner Central site, go to the Home page in Experience Builder.
2. Click the **Quick Create** component and add another global action. By default, a New Account action is added. Click it and select the global action you created for partners to register deals.
3. To save your changes, publish the site.
4. Log in as a partner to test the deal registration process.
   - Submit a couple registered deals from the Quick Create button.
   - In a different browser, log in to see if the approval workflows are working. Approve or reject a deal.
   - Back in the site, check the lead and deal list views as partner.

Market Development Funds

Drive demand for your products and provide incentives to partner users by offering market development funds as part of your channel marketing program. Create marketing budgets, allocate marketing funds or co-op (accrued) funds to channel partners, streamline fund requests, and process fund claims using Market Development Fund (MDF) features. Channel account managers can get a full audit of MDF activity, including fund requests and claims approval.

Available in: Salesforce Classic and Lightning Experience
Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

With Market Development Fund features, you can:

- Create marketing budgets
- Allocate marketing funds or co-op (accrued) funds to channel partners
- Streamline fund requests
- Process fund claims

Note: Setting up Market Development Funds is easy, using Guided Setup. Click **Experience Workspaces** > **Guided Setup** > **Market Development Fund**.

The Market Development Fund reports, available in the guided setup, make it easy to understand partner adoption, funds usage, and marketing ROI. Market Development Funds is available out-of-the-box for partner sites. We created a Budget custom report type for you. If you want to view information about allocations, requests, or claims, create report types for those objects and give partners read access to them.

IN THIS SECTION:

Create a Market Development Budget

Channel account managers can create budgets for specific vendor groups based on location, type of funds (Market Development or co-op), or by channel programs. Using custom lookup fields, they can also associate budgets with marketing campaigns.

Configure Market Development Budgets

Configure Partner Marketing Budgets so that channel account managers can access them. Set up workflows to streamline the approval process.

Create a Partner Fund Allocation

Allocate Market Development Funds (MDF) or co-op funds to channel partners from an existing budget. Allocations are associated with budgets and channel partners to track budget usage.

Configure Partner Fund Allocations

Configure partner fund allocation for your partner site to make funds available to your partner users. Channel account managers can create and update funds and track fund activity.

Create a Partner Fund Request

Partner users can request funds before marketing a vendor's product or service. Channel account managers can approve the fund request. Fund requests are associated with channel partners, allocations, and campaigns to track how allocated funds are used.

Configure Partner Fund Requests

Configure Partner Fund Requests so that partner users can request funds for marketing campaigns and channel account managers can approve or reject the requests.

Create a Partner Fund Claim

Let partner users claim money for expenses incurred on marketing activities. Claims are associated with fund requests.

Configure Partner Fund Claims

Configure Partner Fund Claims so that partner users can claim funds for reimbursement after running a marketing campaign. Channel account managers can approve or reject the claim.

Create a Market Development Budget

Channel account managers can create budgets for specific vendor groups based on location, type of funds (Market Development or co-op), or by channel programs. Using custom lookup fields, they can also associate budgets with marketing campaigns.

If you have a Partner License and have enabled Experience Cloud sites, the Market Development Fund objects are available in your org.

1. From the App Launcher, find and open **Partner Marketing Budget**.
2. Note: Field-level security can't be used to edit standard fields on partner marketing budgets.

   Click **New** and enter the name, type, amount, and start and end dates.
3. Save the budget.

Select **Ignore Validation** to bypass validation criteria and allow more flexibility to how budgets are allocated, claimed, and requested. Ignore Validation can't be reversed after it's selected for a budget.

You can update allocations, claims, and requests for this budget. The updated values must be associated with a budget that has the same validation status as this one.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create budget
- Create on budget

To update budget
- Update on budget

Configure Market Development Budgets

Configure Partner Marketing Budgets so that channel account managers can access them. Set up workflows to streamline the approval process.

Configuring partner marketing budgets for your Partner Central Experience Cloud site involves the following steps.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

IN THIS SECTION:

Customize Page Layouts for Partner Marketing Budgets

Page layouts control field visibility and behavior for different types of users. Channel account managers need to create and update budgets. The company may not want partner users to have access to budgets.

Grant Channel Account Managers Access to Partner Marketing Budgets

Create a permission set that gives the channel account managers Create, Read, and Update permissions on Partner Marketing Budgets.

Share Partner Marketing Budgets with the Channel Account Manager

Create a sharing rule that gives channel account managers access to budgets.

Create Approval Workflows for Partner Marketing Budgets

Approval workflows are unique to each organization's marketing needs and business processes.

Customize Page Layouts for Partner Marketing Budgets

Page layouts control field visibility and behavior for different types of users. Channel account managers need to create and update budgets. The company may not want partner users to have access to budgets.

Create a partner marketing budget page layout for the channel account manager (CAM).

1. From Setup, enter `Budget` in the Quick Find box, then select **Page Layouts** under Partner Marketing Budget.
2. Create a Partner Marketing Budget page layout for channel account managers by cloning the master partner marketing budget layout. Let's call this **Marketing Budget - CAM**.
3. Modify the page layout to add, remove, or modify the behavior of fields, action buttons, related lists, and layouts based on who the layout is for. Typically, channel managers create and update budgets.
4. Save the page layout.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create or customize page layouts

- Customize Application

Grant Channel Account Managers Access to Partner Marketing Budgets

Create a permission set that gives the channel account managers Create, Read, and Update permissions on Partner Marketing Budgets.

If you have a Partner License and have enabled Experience Cloud sites, Market Development Fund objects are available in your org.

1. From Setup, enter `Permission` in the Quick Find box, then select **Permission Sets**.
2. Click **New**.
3. Enter your permission set information.
4. Select the channel account manager profile for the type of user that this permission set is assigned to

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create permission sets

- Manage Profiles and Permission Sets

To assign permission sets

- Assign Permission Sets

Share Partner Marketing Budgets with the Channel Account Manager

Create a sharing rule that gives channel account managers access to budgets.

If you have a Partner License and have enabled Experience Cloud sites, Market Development Fund objects are available in your org.

Create a sharing rule that grants budget access to internal users.

1. From Setup, enter `Sharing` in the Quick Find box, then select **Sharing Settings**.
2. Click **New** under **Partner Marketing Budget** > **Sharing Settings**.
3. Enter your rule information for your channel manager.
4. Save your sharing rule.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create sharing rules

- Manage Sharing

Create Approval Workflows for Partner Marketing Budgets

Approval workflows are unique to each organization's marketing needs and business processes.

Approval workflows should account for how you want to route submitted budgets, how you want to filter and evaluate them, and what notifications you want to send out. A few guidelines for planning your approval workflows:

- **Email Templates**: Create email templates for each stage of the approval process that you wish to send notifications for.
- **Routing**: Screen budgets by record type and submit all budgets for approval.
- **On Submission**: Identify what field values change on the budget on submission, for example the budget status. Decide if the budget record must be locked until it is approved or rejected.
- **Evaluation**: Decide what qualifies a submitted budget to be considered for approval. Determine any thresholds, filter criteria, and stages you want to filter by.
- **Approval**: Decide who to route the submitted budget to. Typically, this is an internal user. Decide what happens on approval.
  - Send an email notification to the channel account manager.
  - Set a budget expiration date and save the budget approval date for reporting.
- **Rejection**: Decide what criteria disqualify a budget. Send an email notification to inform them of the rejection. Unlock the budget record so channel account managers can modify and resubmit if necessary.

For detailed instructions, see the approval workflow documentation in the Salesforce Help

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create processes:

- Customize Application

Create a Partner Fund Allocation

Allocate Market Development Funds (MDF) or co-op funds to channel partners from an existing budget. Allocations are associated with budgets and channel partners to track budget usage.

If you have a Partner License and have enabled Experience Cloud sites, Market Development Fund objects are available in your org.

1. From the App Launcher, find and open **Fund Allocation**.
2. Click **New** and enter the name, budget, channel partner, and amount.
3. Save the allocation.

Allocations can be updated. The budget associated with the updated allocation must have the same validation status as the original.

Note: We've created the **Total Approved Allocations** field for you. This formula field is automatically updated.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create allocations
- Create on allocations

To update allocations
- Update on allocations

Configure Partner Fund Allocations

Configure partner fund allocation for your partner site to make funds available to your partner users. Channel account managers can create and update funds and track fund activity.

Configuring partner fund allocations for your Partner Central Experience Cloud site involves the following steps.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

IN THIS SECTION:

Customize Page Layouts for Partner Fund Allocations

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create or customize page layouts
- Customize Application

Page layouts control field visibility and behavior for different types of users. Channel account managers need to create and update allocations, but the company may not wish to expose some information about allocations to partner users.

Create a marketing fund allocation page layout for the channel account manager.

1. From Setup, enter `Allocation` in the Quick Find box, then select **Page Layouts** under Partner Fund Allocation.
2. Create a Partner Fund Allocation page layout for channel account managers by cloning the master partner fund allocation layout. Let's call this **Marketing Fund Allocation - CAM**.
3. Modify the page layout to add, remove, or modify the behavior of fields, action buttons, related lists, and layouts based on who the layout is for. Typically, channel managers create and update fund allocations.
4. Save the page layout.

Grant Channel Account Managers Access to Partner Fund Allocations

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create permission sets
- Manage Profiles and Permission Sets

To assign permission sets
- Assign Permission Sets

Create a permission set to grant channel account manager permissions on Partner Fund Allocations.

If you have a Partner License and have enabled Experience Cloud sites, Market Development Fund objects are available in your org.

Create a permission set that gives the channel account managers Create, Read, and Update permissions on Partner Fund Allocations.

1. From Setup, enter `Permission` in the Quick Find box, then select **Permission Sets**.
2. Click **New**.
3. Enter your permission set information.
4. Select the channel account manager profile for the type of user that this permission set is assigned to

Share Partner Fund Allocations with the CAM

Create two sharing rules: one for the channel account manager (CAM) and one for the partner user.

If you have a Partner License and have enabled Experience Cloud sites, Market Development Fund objects are available in your org.

Create two sharing rules to grant the appropriate access to partner fund allocations for channel account managers and partner users.

1. From Setup, enter `Sharing` in the Quick Find box, then select **Sharing Settings**.
2. Click **New** under **Partner Fund Allocations** > **Sharing Settings**.
3. Enter your rule information for your channel manager.
4. Save your sharing rule.
5. Create a sharing rule for your partner users as well.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create sharing rules
- Manage Sharing

Create a Partner Fund Request

Partner users can request funds before marketing a vendor's product or service. Channel account managers can approve the fund request. Fund requests are associated with channel partners, allocations, and campaigns to track how allocated funds are used.

If you have a Partner License and have enabled Experience Cloud sites, the Market Development Fund objects are available in your org.

1. From the App Launcher, find and open **Fund Requests**.
2. Click **New** and enter the name, channel partner, requested amount, and status.
3. Save the fund request.

Requests can be updated. The budget associated with the updated request must have the same validation status as the original.

Tip: You can create an approval workflow for partners to submit fund requests to the channel account manager. To prevent users from manually changing the status value on records they own, make sure the "Status" field on the Request object is set to Read-only.

Note: We've created the **Total Approved Fund Requests** field for you. This formula field is automatically updated.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create fund request
- Create on fund request

To update fund request
- Update on fund request

To delete fund request
- Delete on fund request

Configure Partner Fund Requests

Configure Partner Fund Requests so that partner users can request funds for marketing campaigns and channel account managers can approve or reject the requests.

Configuring market fund requests for your Partner Central Experience Cloud site involves the following steps.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

IN THIS SECTION:

Grant Channel Account Managers and Partner Users Access to Partner Fund Requests

Create a permission set for your channel account manager (CAM) or financial department so they can manage and approve fund requests. Create another permission set for your partner users so they can submit fund requests.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create permission sets
- Manage Profiles and Permission Sets

To assign permission sets
- Assign Permission Sets

Create two permission sets. Grant Create, Read, Update, and Delete permissions on Fund Requests to the channel manager. Grant channel partner users Create, Update, and Read on Fund Requests.

1. From Setup, enter `Permission` in the Quick Find box, then select **Permission Sets**.
2. Click **New**.
3. Create a permission set for the channel account manager.
4. Select the channel account manager profile for the type of user that this permission set is assigned to for one of your permission sets.
5. Create a permission set for the partner user, giving them only Create, Read, and Update access to Fund Requests.

Create Approval Workflows for Partner Fund Requests

Approval workflows are unique to each organization's marketing needs and business processes.

Approval workflows should account for how you want to route submitted fund requests, how you want to filter and evaluate them, and what notifications you want to send out. A few guidelines for planning your approval workflows:

- **Email Templates**: Create email templates for each stage of the approval process that you to send notifications for.
- **Routing**: Screen fund request by record type and submit all fund requests for approval.
- **On Submission**: Identify what field values change on the field request on submission, for example the fund request status. Decide if the fund request record must be locked until it is approved or rejected.
- **Evaluation**: Decide what qualifies a submitted request to be considered for approval. Determine any thresholds, filter criteria, and stages you want to filter by.
- **Approval**: Decide who to route the submitted fund request to. Typically, this is the channel account manager or the financial department. Decide what happens on approval.
  - Change the Fund Request Status to approved.
  - Send an email notification to the partner user.
- **Rejection**: Decide what criteria disqualify a fund request. Set the Fund Request Status to rejected. Send an email notification to inform them of the rejection. Unlock the fund request record so partner user can modify and resubmit if necessary.

For detailed instructions, see the approval workflow documentation in the Salesforce Help

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create processes:
- Customize Application

Customize Page Layouts for Partner Fund Requests

Page layouts control field visibility and behavior for different types of users. Partner users submit fund requests and channel account managers approve them.

Create two partner fund request page layouts: one for the channel account manager (CAM) and one for the partner user.

1. From Setup, enter `Request` in the Quick Find box, then select **Page Layouts** under Partner Fund Request.
2. Create a Partner Fund Request page layout for channel account managers by cloning the master partner fund request layout. Let's call this **Marketing Fund Request- CAM**.
3. Modify the page layout to add, remove, or modify the behavior of fields, action buttons, related lists, and layouts based on who the layout is for. Typically, channel managers approve and update requests.
4. Save the page layout.
5. Create another page layout for the partner users, keeping in mind that they submit fund requests.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create or customize page layouts
- Customize Application

Create a Partner Fund Claim

Let partner users claim money for expenses incurred on marketing activities. Claims are associated with fund requests.

If you have a Partner License and have enabled Experience Cloud sites, Market Development Fund objects are available in your org.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create claims
- Create on claims

To update claims
- Update on claims

Tip: Create a separate permission set for the channel account manager (CAM) or financial department to manage and approve fund claims. Partner users only need Create, Update, and Read permissions to submit a fund claim.

1. From the App Launcher, find and open **Fund Claim**.
2. Click **New** and enter the name, request, amount, and status of the claim.
3. Save the claim.

Claims can be updated. The budget associated with the updated claim must have the same validation status as the original.

Tip: You can create an approval workflow for partners to submit fund claims for reimbursement by the channel account manager or financial department. To prevent users from manually changing the status value on records they own, make sure the "Status" field on the Claim object is set to Read-only.

Note: We've created the **Total Approved Fund Claims** and **Total Reimbursed Fund Claims** fields for you. These formula fields are automatically updated.

Configure Partner Fund Claims

Configure Partner Fund Claims so that partner users can claim funds for reimbursement after running a marketing campaign. Channel account managers can approve or reject the claim.

Configuring market fund claims for your Partner Central Experience Cloud site involves the following steps.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

IN THIS SECTION:

Grant Channel Account Managers and Partner Users Access to Partner Fund Claims

Create a permission set for your channel account manager (CAM) or financial department so they can manage and approve and reimburse fund claims. Create another permission set for your partner users so they can submit fund claims.

Create Approval Workflows for Partner Fund Claims

Approval workflows are unique to each organization's marketing needs and business processes.

Customize Page Layouts for Partner Fund Claims

Page layouts control field visibility and behavior for different types of users. Partner users submit fund claims and channel account managers approve and reimburse them.

Grant Channel Account Managers and Partner Users Access to Partner Fund Claims

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create permission sets
- Manage Profiles and Permission Sets

To assign permission sets
- Assign Permission Sets

Create a permission set for your channel account manager (CAM) or financial department so they can manage and approve and reimburse fund claims. Create another permission set for your partner users so they can submit fund claims.

Create two permission sets. Grant Create, Read, Update, and Delete permissions on Fund Claims to the channel manager. Grant channel partner users Create, Update, and Read on Fund Claims.

1. From Setup, enter *Permission* in the Quick Find box, then select **Permission Sets**.
2. Click **New**.
3. Create a permission set for the channel account manager.
4. Select the channel account manager profile for the type of user that this permission set is assigned to for one of your permission sets.
5. Create a permission set for the partner user, giving them only Create, Read, and Update access to Fund Claims.

Create Approval Workflows for Partner Fund Claims

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create processes:
- Customize Application

Approval workflows are unique to each organization's marketing needs and business processes.

Approval workflows should account for how you want to route submitted fund claims, how you want to filter and evaluate them, and what notifications you want to send out. A few guidelines for planning your approval workflows:

- **Email Templates**: Create email templates for each stage of the approval process that you to send notifications for.
- **Routing**: Screen fund claims by record type and submit all fund claims for approval.
- **On Submission**: Identify what field values change on the field claim on submission, for example the fund claim status. Decide if the fund claim record must be locked until it is approved or rejected.
- **Evaluation**: Decide what qualifies a submitted claim to be considered for approval. Determine any thresholds, filter criteria, and stages you want to filter by.
- **Approval**: Decide who to route the submitted claim to. Typically, this is the channel account manager or the financial department. Decide what happens on approval.
  - Change the Fund Claim Status to approved.
  - Send an email notification to the partner user.
- **Rejection**: Decide what criteria disqualify a fund claim. Set the Fund Claim Status to rejected. Send an email notification to inform them of the rejection. Unlock the claim record so partner user can modify and resubmit if necessary.

For detailed instructions, see the approval workflow documentation in the Salesforce Help

Customize Page Layouts for Partner Fund Claims

Page layouts control field visibility and behavior for different types of users. Partner users submit fund claims and channel account managers approve and reimburse them.

Create two partner fund claim page layouts: one for the channel account manager (CAM) and one for the partner user.

1. From Setup, enter `Claim` in the Quick Find box, then select **Page Layouts** under Partner Fund Claim.
2. Create a partner fund claim page layout for channel account managers by cloning the master partner fund claim layout. Let's call this **Marketing Fund Claim- CAM**.
3. Modify the page layout to add, remove, or modify the behavior of fields, action buttons, related lists, and layouts based on who the layout is for. Typically, channel managers approve and update requests.
4. Save the page layout.
5. Create another page layout for the partner users, keeping in mind that they submit fund claims, but don't approve them.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create or customize page layouts

- Customize Application

Reach More Customers with Channel Marketing

Create seamless marketing campaigns for partner user with channel marketing tools for partner sites.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

SEE ALSO:

Set Up Campaign Marketplace

Guided Setup: Distributed Marketing for Experience Cloud

Set Up Campaign Marketplace

With Campaign Marketplace, you can provide the structure and guidance necessary for partners to successfully execute campaigns. Channel marketers can create and share marketing campaigns, guidelines, and assets with partners. They can also customize the look and feel of the marketplace and highlight information that is important to partners. Partners can then choose which campaigns work best for them. This feature is available in Experience Builder sites and Lightning Bolt Solutions.

Enable your channel marketers to promote pre-approved campaigns. Let partners browse, signup for, and run campaigns in just a couple of easy steps. When a partner clicks **Sign Up** on a campaign they want to run, a child campaign record is created from the original campaign. Partners can access all assets associated with the campaign and customize it to fit their brand. You must have a Partner Community license or use Distributed Marketing to use Campaign Marketplace.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create campaigns.
- "Create on Campaigns"

To read campaigns and use Campaign Marketplace.
- "Read on Campaigns"

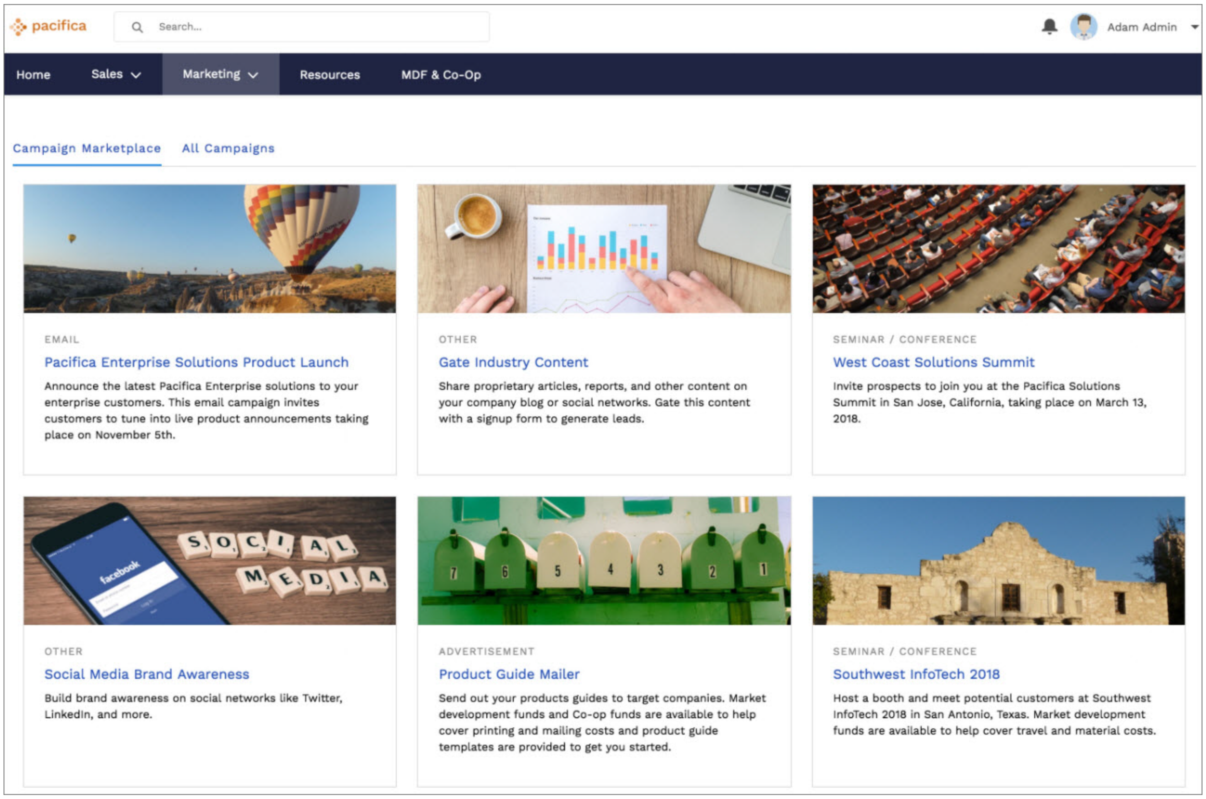
To edit campaigns.
- "Edit on Campaigns"

To create or customize page layouts and record types.
- "Customize Application"

Note: We recommend that you define your campaign hierarchy before completing these steps. Think about how you can organize your campaign hierarchy to optimize reporting on campaigns. You can organize them by channel programs and levels or you can organize them by region.

1. Go to **Customize** > **Campaigns** > **Page Layouts**.
2. Create 2 channel marketing page layouts: one for the channel marketer and one for the partner profiles in your partner site.
3. Go to **Customize** > **Campaigns** > **Record Types** and create a record type called Channel Marketing.
4. Go to **Campaigns** > **Create New View** and create a campaign list view called Campaign Marketplace.
5. Create campaigns for your partner users using the Channel Marketing record type.
6. Configure your campaign marketplace in Experience Builder.

Example: Campaign Marketplace



Add filters to your list view to create different categories, such as Recommended and High ROI. Create multiple categories, and display them as tabs to make it easier for partners to search for the campaigns they need. You can also add a custom image to your campaign with the new campaign image field.

SEE ALSO:

Best Practices for Campaign Marketplace
Campaign Marketplace
Guided Setup: Distributed Marketing for Experience Cloud

Best Practices for Campaign Marketplace

Looking for best practices and use cases to help you get the most out of Campaign Marketplace? You've come to the right place.

EDITIONS

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** editions

Highlighting a Custom Field

Channel managers can use Highlights to call out certain types of campaigns. Create a custom formula field for greater flexibility when choosing types of fields to highlight.

For example, you can create a custom formula text field called "Recently Added". Enter the following formula in the "Simple Formula" box:

```
IF((TODAY() - 7) < DATEVALUE(CreatedDate), "RECENTLY ADDED", "")
```

Add the "Recently Added" field to the columns in the list view you are using in your marketplace.

Under **Highlights**, select the “Recently Added” field and choose the color you want to highlight recently added campaigns.

Managing Visibility of Campaigns Using List Views

Channel managers can configure components to manage how campaigns are displayed to partners.

- Use filters to control visibility for campaigns. By default, we only show campaigns that are active and within the start and end of their date range. You can use activation or the start and end date to control visibility. Optionally add an approval process and a custom "approved" field on campaigns to control the visibility in the list view.
- Provide different types of marketplaces to partners. Add multiple marketplaces, with different list views, to different regions on a page or using the tab component.
- Hide partner-owned campaigns from the marketplace without using a trigger. You can filter the campaign list view using Owner User Type. You can also add a custom checkbox field to the campaign and set the default to "false". Make sure the field is read-only for the profiles that sign up for campaigns. You can then filter the list view by campaigns with the custom checkbox marked "true".

Copying Fields That Are Not on a Partner’s Page Layout

When a partner signs up for a campaign, fields that are not on the partner’s page layout are not copied. Use a trigger to copy fields you want to include on the child campaign when a partner signs up. These fields don’t show up in the layout, but are included in the child campaign record. We recommend using this trigger:

```
trigger onSignUpCopyFields on Campaign (before insert) {  for (Campaign childCamp :
System.Trigger.new) { // check if the campaign is being signed-up if (childCamp.parentId
!= null) { // may need to add more conditions here, depending on campaign hierarchy
and usage. // read all the campaign data that might not be on the child // sign-up/clone
doesn’t copy the fields not on the user's page layout Campaign parentCamp = [SELECT
Id, Name, Type, YourCustomFieldName__C FROM Campaign WHERE Id =: childCamp.ParentId];
YourCustomFieldName__C = parentCamp.YourCustomFieldName__C; // You can update the record
directly only before insert.
```

Note: Only fields that partners have read access to are displayed.

Signing Up for a Campaign

Partner users should default their “Actual Cost in Campaign” field to null and their “Num Sent in Campaign” field to 0 before signing up for a new campaign.

SEE ALSO:

Set Up Campaign Marketplace

Campaign Marketplace

Guided Setup: Distributed Marketing for Experience Cloud

In general, you can use the standard Distributed Marketing help and training documentation to set up, configure, and use Distributed Marketing. However, use this guide when setting up Distributed Marketing in Experience Builder instead of Lightning App Builder.

- Ensure that your org uses My Domain.
- To access the Experience Builder, in Sales or Service Cloud, navigate to **Setup**. Use Quick Find to navigate to **All Communities**. Click **Builder** for the site you’re editing.

USER PERMISSIONS

To create, customize, or publish a digital experience:

- Create and Set Up Experiences AND View Setup and Configuration

Track Performance with Partner Scorecard

EDITIONS

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To manage scorecards:
- Create, Edit, and Delete on Accounts

  AND

  Create, Edit, and Delete on Reports

  AND

  Create, Edit, and Delete on Scorecards

To view scorecards:
- Read on Accounts

  AND

  Read on Reports

  AND

  Read on Scorecards

card metrics:

rts

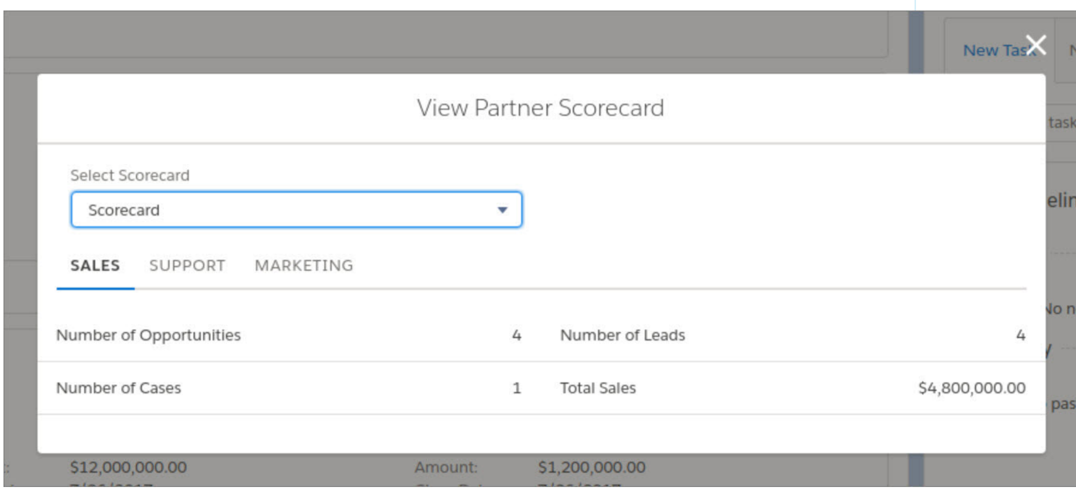
Channel account managers can measure partner users' performances and establish benchmarks for their channel programs using partner scorecards. You can customize partner scorecards to display any report summary results that your channel account manager or executive team wants to see. Add multiple scorecards to track more than one category. Partner scorecards are available in Lightning Bolt Solutions.

Partner scorecards are only available with Partner Community licenses. If you don't have access to scorecards, contact Salesforce Customer Support to enable Manage Scorecards in your org.

Add the "View scorecard" action to the account layout to display the scorecard directly on the account. Each scorecard displays admin-defined metrics that monitor partner performance. You can organize metrics into different categories, such as sales, marketing, and support. When you select the category you want each metric to belong to, the metrics sort into different tabs on your scorecard. Scorecards are built on top of Salesforce reports.

1. Go to **Scorecards**, and click **New**.
2. From Setup, enter `Scorecard Metric` and select **Fields**, to enter categories that you need and are not already included.
3. Go back to your scorecard and add metrics to it. Assign metrics to categories if you want to group them by KPIs.
4. Associate your scorecard with a program, level, or partner account. Once you've associated your scorecard with a program, level, or partner account, you can view the scorecard from that account. If you've organize different scorecards into tabs, you can click the tab to see the scorecard metrics associated with that category.

Example: Partner Scorecard for Sales



Note: Metrics are pulled from summary reports. You must have access to the reports you want to associate with scorecards. Scorecard associations are permanently deleted when an account is disabled.

See Configure Reports for Partner Scorecard for more information about setting up metrics for scorecards.

SEE ALSO:

Configure Reports for Partner Scorecard

Design the Field Layout for Reports Created from Your Custom Report Type

Build a Report

Configure Reports for Partner Scorecard

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create, edit, and delete reports in private folders:
- Create and Customize Reports

To create, edit, and delete reports in public and private folders:
- Report Builder OR Report Builder (Lightning Experience)

Assigning metrics to a Partner Scorecard is easy, but it's important to correctly configure the reports. Follow these tips to display accurate information in your scorecard.

Here are a few things to keep in mind regarding the reports that you associate with your partner scorecard:

- Scorecards do not support report types on Account. To display data about objects that are related to Accounts, use a report type associated with a supported object or create a custom report type that includes both Account and a supported object.
- Each Metric is pulled from a summary field of a report. For a report to work with scorecards, it can have a maximum of one summary field in addition to the row count. The summary value is what is displayed on your scorecard. Your metric must be associated with a summary report or the data does not display correctly.
- You must have read access on all reports that you want to associate and view with scorecards.
- If an account is disabled, scorecards associated that account are permanently deleted.
- Account ID fields must be available on the report. The Scorecard component dynamically filters reports to the current Partner Account.

The following table displays information about which objects Scorecards support and how to set up reports for them.

Object	Report Type	Actions to Take
Opportunity	Standard	Set Field Level Security of Partner Account to Visible for all profiles of users viewing scorecards.
Opportunity	Custom	Set Field Level Security of Partner Account to Visible for all profiles of the users viewing scorecards. Add the Partner Account ID field to the report type layout.
Lead	Standard	Set Field Level Security of Partner Account to Visible for all profiles of the users viewing scorecards.

Object	Report Type	Actions to Take
Lead	Custom	Set Field Level Security of "Partner Account" to Visible for all profiles of the users viewing scorecards. Add the Partner Account ID field to the report type layout.
Case	Standard	No Action Necessary. Case Contact Account Id assumed to be Partner Account ID.
Case	Custom	Add the Case Contact's Account Id field to the report type layout
Partner Fund Allocation	Standard	No standard report types exist for this object.
Partner Fund Allocation	Custom	Add the Channel Partner Account ID field to the report type layout.
Partner Fund Request	Standard	No standard report types exist for this object.
Partner Fund Request	Custom	Add the Channel Partner Account ID field to the report type layout.
Custom Object	Standard	Add custom lookup field on Accounts. API name must be Scorecard_Account. Must use "(Custom Object) with Account" as report type.
Custom Object	Custom	Add custom lookup field on Accounts. API name must be Scorecard_Account. Add the Account ID field to the custom object layout.
Any Standard Object with an Account field and no Partner Account field	Standard	Scorecards do not support this type of report with default fields. Add a custom Lookup Relationship field on Accounts. The API name must be Scorecard_Account. Use "(Custom Object) with Account" as the report type.
Any Standard Object with an Account field and no Partner Account field	Custom	Scorecards do not support this type of report with default fields, unless a supported object is included in the report type. Otherwise, add a custom Lookup Relationship field on Accounts. The API name must be Scorecard_Account. Add Account Id to the report type layout.
Any other standard object	Standard	Scorecards do not support this type of report with default fields, unless a supported object is included in the report type. Otherwise, add a custom Lookup Relationship field on Accounts. The API

Object	Report Type	Actions to Take
		name must be Scorecard_Account. Use "(Custom Object) with Account" as the report type.
Any other standard object	Custom	Add a supported object to the report type, or add a custom lookup relationship field on Accounts. API name must be Scorecard_Account. Add the Account ID field to the report type layout for the custom entity

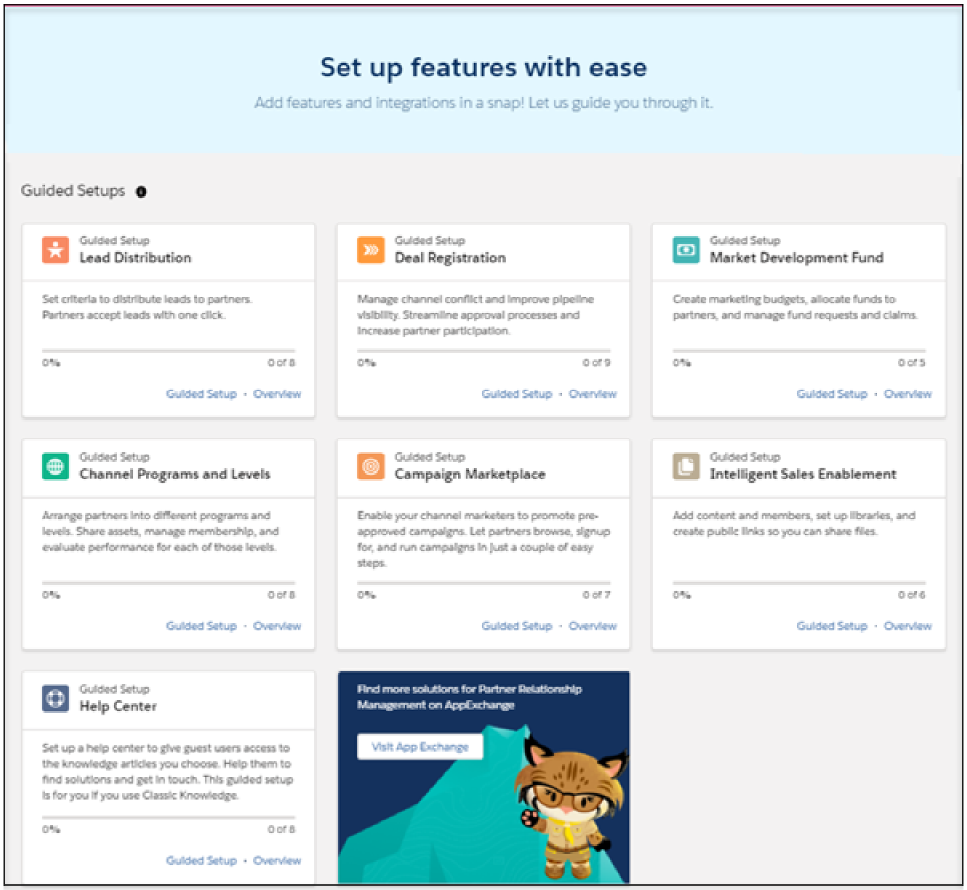
SEE ALSO:

Design the Field Layout for Reports Created from Your Custom Report Type

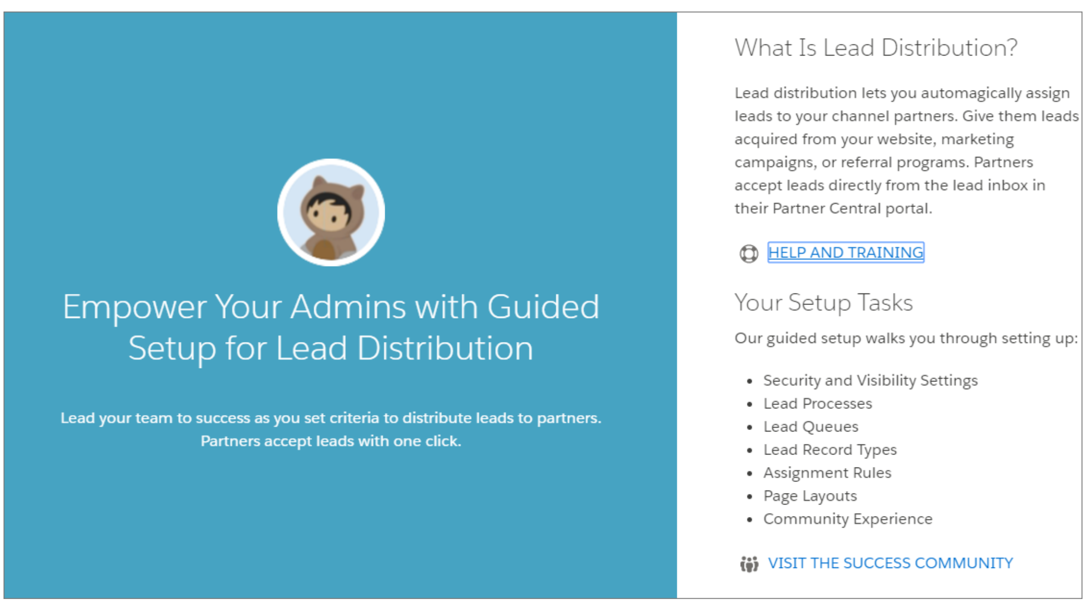
Configure Features with Guided Setup

Guided setup walks you through setting up visibility, processes, workflows, record types, layouts, and assignment rules for Salesforce features. From start to finish, guided setup leads you through each step with easy-to-follow directions and navigable links to settings pages.

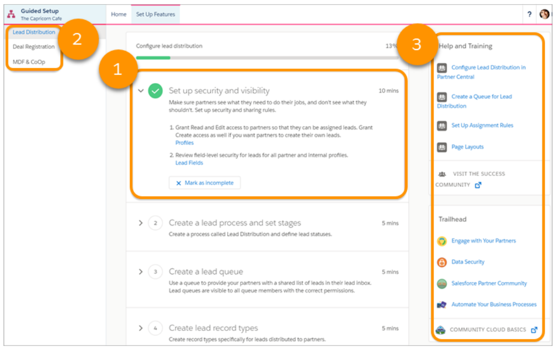
As long as you have a Partner license, you can access Guided Setup from Experience Workspaces. Click the Guided Setup tile, and select which feature you want to set up.



Click **Overview** to get a description of the feature and the setup tasks.



Click **Guided Setup** to begin setting up the feature.



1. Each setup task has been organized into a separate step. Navigable links take you to the right setup pages for completing tasks. After you complete the step, you can mark that task as complete and move on to the next.
2. Not able to finish one of the setups? Or do you want to hit pause on a setup and move on to the next one? Not a problem. You can easily switch between setups from the upper left corner of the Guided Setup page. Any completed steps remain marked until you come back to them, so it's easy to find your place again.
3. Need a bit more information about a process or step? Want to learn more? Salesforce Help, a link to the Trailblazer community, and related Trails are easily accessible on the right side of the screen.

Configure Guided Setup Reports

Additional configuration is required once you've installed your Guided Setup reports.

Once you've installed reports from the Guided Setup, filter values must be added to some reports. Check the filters on your reports to ensure that they are set correctly.

1. From the App Launcher, find and open **Reports**.
2. Click **All Folders** and select the report folder.
3. Select the report you want to customize and click **Edit**.
4. Make any necessary changes and save.

If you want to remove any of the reports or folders from your organization, you must manually delete them.

Tip: Don't forget to also delete the custom report type for any reports that you decide to remove from your org.

Lead Distribution Reports

These reports are provided in the **Lead Distribution Reports** folder.

Report Name	Description	Additional Customization
Unassigned Leads	Number of unassigned partner leads.	Replace lead owner ID filter with the queue record ID.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To delete reports in My Personal Custom Reports folder
- Create and Customize Reports

To delete reports in public folders
- Manage Public Reports

Report Name	Description	Additional Customization
Unassigned Leads by Age	Displays unassigned leads by age.	• Replace the lead owner ID filter with the queue record ID • Add the Lead Age formula field: ROUND(NOW()-CreatedDate, 0)
Lead Creation Trend	Number of partner leads created.	Replace the lead owner ID filter with the queue record ID
Leads by Partner	Number of leads owned by partner.	Tip: Add an age filter to Leads
Leads by Stage	Displays partner leads by stage.	N/A
Leads by Source	Displays partner leads by channel.	N/A
Leads by Region	Displays partner leads by region.	N/A
Leads with No Activity	Displays partner leads with no activity by timeframe.	N/A

Deal Registration Reports

These reports are provided in the **Deal Registration Reports** folder.

Report Name	Description	Additional Customization
Number of Approved Deals by Month	Number of approved deals for current fiscal year by month.	Update the lead source and lead status filters with the correct filter values
Approved Deals by Value	Total value of approved deals.	Update lead source and lead status filters with the correct filter values
Approved to Converted Ratio	Ratio of deals approved to deals converted for the current fiscal year by partner.	N/A
Closed Deals by Partner	Displays the value closed deal registered by partners.	N/A
Deals Registered by Age	Displays registered deals by age.	Add Age custom field
Deal Registration Trend	Displays deal registration over time.	Update lead source and lead status filters with the correct filter values
Deals Expiring Soon	Displays registered deals that expire in the next 30 days.	• Update lead source filter with the correct filter value

Report Name	Description	Additional Customization
		• Add Expiration date field and a filter (f.i.: Next 7 days)
Deals Pending Approval	Number of deals pending approval.	N/A
Rejected Deal	Number of deals that have been rejected.	Update lead source filter value
Converted Deals with No Activity	Number of deals registered with no partner activity in the last 14 days.	Update lead source filter value
Top Active Deals	Most valuable converted deals that have not yet been closed.	Update lead source filter value

Market Development Fund Reports

These reports are provided in the **Market Development Fund Reports** folder.

Report Name	Description	Additional Customization
Total Budget	Amount of total marketing budget.	N/A
Total Budget Allocated	Total budget allocated to partners.	N/A
Fund Requests Approved/Rejected	Total approved and rejected fund requests.	N/A
Fund Claims Approved/Rejected	Total approved and rejected claims.	N/A
Total Funds Paid	Total paid claims.	N/A
Budget Remaining	Amount of budget available.	N/A
Funds Remaining	Amount of allocated funds available.	N/A
Fund Requests in Draft	Number of fund requests in draft status.	N/A
Fund Requests Approved/Rejected	Displays fund requests by approved or rejected status.	N/A
Fund Request Submit Trend	Number of fund requests submitted.	N/A
Fund Requests By Activity Type	Number of approved fund requests by activity.	N/A
Fund Requests By Activity Type (value)	Number of approved fund requests by activity type (value).	N/A
Fund Claims in Draft	Number of fund claims in draft status.	N/A
Total Funds Claimed	Displays fund claims that have been approved.	N/A
Funds Used vs. Allocated By Fund Type	Displays funds used vs. funds allocated by type.	N/A
Funds Used vs. Allocated By Budget	Displays funds used vs. funds allocated by budget.	N/A

Report Name	Description	Additional Customization
Funds Used By Partners	Displays requested funds vs. allocated funds by partner.	N/A

Manage Customer Relationships with Experience Cloud

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Give your customers a private and secure place to access and update their account information with the Customer Account Portal solution from Experience Cloud. Improve customer relationships and decrease service costs by allowing customers to see and pay invoices. They can also update their account information and search your knowledge base for answers to their most frequently asked questions.

Customer Account Portal is designed with account management in mind, so you can:

- Give access to customers to create and update vital information in any Salesforce record, including custom objects. As a result, reduce call center calls for easily resolved issues, like updating a phone number or address.
- Integrate and expose data and processes from third-party systems, like ERP and ecommerce, via Salesforce Connect.
- Show customers information that matters the most in their member profile, and let them update their accounts on the fly.
- Use Salesforce Knowledge to give customers answers to their most pressing questions about your product and brand.

Customer Account Portal has the same flexibility and extensibility that you're accustomed to with other Lightning sites, so you can:

- Build custom pages and use custom branding.
- Expose more CRM objects and data that suit your business needs.
- Use audience targeting by geolocation, and create personalized content for customers by their geographical location.

Example: Here are a few industry examples of how a company can use Customer Account Portal to enhance customer relationships.

- A utilities company allows customers to check their bills and pay them online.
- An insurance company lets clients file claims online.
- A university makes it easy for students to sign up for classes online.

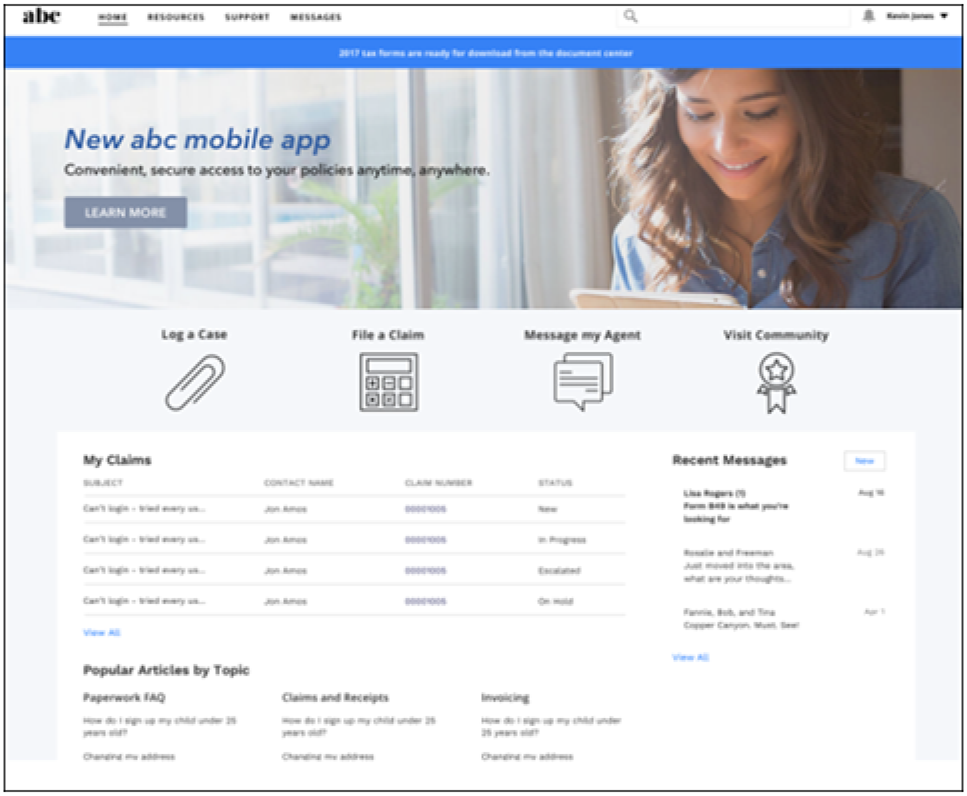
Build a Portal with the Customer Account Portal Solution

USER PERMISSIONS

To create, customize, or publish an experience:

- Create and Set Up Experiences AND View Setup and Configuration

Set up a custom space where your customers can take care of their needs on their own, and reduce support calls to your company. Admins can set up Customer Account Portal with a few clicks.



The Customer Account Portal comes with a variety of components out-of-the-box to make your company's portal a personalized point of access to information, processes, and experts:

- Use the Tile Menu on page 423 for an intuitive and visually stunning navigation experience.
- Configure the Member Profile on page 379 component to give customers all their account information and settings in one convenient place.
- Give access to your company's knowledge base to answer your customers' most frequently asked questions

Get started with this handy list of setup tasks to create your own customer account portal.

Create a Customer Account Portal—Setup Tasks

Review this high-level list of tasks and considerations for prepping and setting up your portal.

Planning	• What's Your Customer Account Portal Strategy? • Extend Salesforce to Customers with the Correct Licenses • Experience Builder Site Limitations • Communities and Community Users in Your Salesforce Org	Prep Your Salesforce Org for a Customer Portal	• Create Experience Cloud Site Users • Super User Access • Delegated Administration

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Set Up a Customer Account Portal	• Update Org-Wide Settings • Check Out Experience Workspaces • Create an Experience Cloud Site • Share More Salesforce Records in Your Site	Advanced Community Features	• Community Moderation • Configure Dashboards to Monitor Your Site • Create Pages and Groups Targeted at Specific Audiences
Community Design	• Customize Your Experience Cloud Site • Customize Experience Cloud Site Pages and Components • Customize Community Navigation • Which Components Can I Use with Customer Account Portal? • Custom Theme Layouts	Reporting	• Experience Cloud site reports and dashboards • Custom Reports • Report Management for Partners • AppExchange Reporting Packages for Experience Cloud Sites • Google Analytics™

What's Your Customer Account Portal Strategy?

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

The type of customer account portal you create depends on your business needs and what you want to accomplish. For example, an insurance company has a different strategy from a clothing retailer.

To get the most out of your Customer Account Portal implementation, ask yourself some questions.

- How many Customer Community licenses do I need? Do I invest in Customer Community licenses or Customer Community Plus licenses?
- What level of data visibility and privacy do I need for each object that I'm exposing to my customers?
- Which objects do I grant permissions to in my customer profiles?
- Do I want to allow my customers to self-register?

SEE ALSO:

Experience Cloud User Licenses

Extend Salesforce to Customers with the Correct Licenses

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Buy customer licenses to enable customer-specific functionality in your org. Customer licenses are required to give access to the Customer Account Portal and set up customer users.

When you buy customer licenses, the following functionality is enabled in your org.

- The default Customer Community profile. You can clone it to create custom customer profiles or extend data access via permissions sets.
- The **Enable as Customer User** button on contacts.
- Access to delegated admin, reports and dashboards, and advanced sharing for customer users.

Check out Communities and Community Users in Your Salesforce Org, a quick video about how Salesforce Experiences live in an org, the differences between licenses, and how Salesforce accounts and site users are associated with one another.

Give Customers Access to Your Knowledge Base Through Help Center

EDITIONS

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** editions

A help center is a public-access, self-service site that makes it easy for people to find answers for themselves. Instead of filing cases through customer support, visitors find the information they need from the articles that you make available from your knowledge base. You reduce the load on your customer support team, and folks get the satisfaction of finding their own solutions.

Use the new Help Center template to create a help center in minutes. When your help center is in place, use a guided setup to step through help center configuration. The guided setup offers links that take you to relevant locations in the help center's user interface.

Tip: If your needs change, you can move from a help center template to another kind of customer portal. A process is available on page 892 in the Administration Workspace for making the switch.

Before You Begin

Here are some facts to help in your decision to select the Help Center template.

- Help Center offers limited support for standard components. For a list of supported components, see Which Components Can I Use with Each Template? on page 269
- Help Center is a public-only template, which doesn't include the site login page.
- Only specific object pages are fully supported, but the template lets you create other standard and custom object pages. For a list of supported pages, see Help Center Template Pages on page 891.

Before you create your help center, there are a few actions you can take to prepare the way.

Enable Salesforce Knowledge in Your Org

Before you can create a help center, Knowledge must be enabled for your org, and you must enable the Knowledge org preference. It's also useful to have a robust collection of Knowledge articles with a focus on solutions to common problems. Ideally, you already have Knowledge enabled along with a large collection of helpful articles. The main purpose of your help center is to give the public easy access to this useful information.

Plan your knowledge base and set up visibility for your data categories

The simpler your data is structured, the easier your help center is to navigate. Make the right content available to the public. You can choose the types of articles to make public so nothing sensitive or proprietary is at risk.

List the topics you intend to cover in your help center

Topics are the foundation of your help center. They make it easy for customers to discover all the information that you provide about a given subject. Talk to your customer support team about the things people ask about most. Base your Featured Topics selection on the most frequently asked questions. If you like, your topics can have a hierarchical structure—for example, you can set up topics with subtopics.

Set up an article layout specifically for your help center

The way an article is laid out can affect how easy it is to access the article's data. Don't hide the lead. Consider offering a summary section at the top so customers can get to basic information quickly.

Note: In Summer '18, we increased the limits on articles and translation languages for some editions. It's useful to know for your help center planning.

- Essentials: 500 Articles, 1 Language
- Enterprise: 50 K Articles, 5 Languages
- Unlimited 150 K Articles, 10 Languages

Gather your resources

Upload the text and image files you plan to use in your help center to your org.

- For the Featured Topics component, upload 250-by-250-pixel images—one for each featured topic. You can have up to 25 featured topics, but consider using fewer to keep your help center easy to navigate.
- Upload images for your help center's logo, login page background, and page header. Your help center images are a branding opportunity, so make them attractive and representative of your brand. The header can be a GIF, JPG, or PNG file with a maximum file size of 20 KB.
- Upload an HTML file for your page footer.

  Note: Your default view of the help center includes the footer: Powered by Salesforce. You can easily delete it or replace it with your own footer content.

SEE ALSO:

Knowledge Settings
Create a Help Center
Organize Experience Cloud Sites with Topics
Set Up Featured Topics
Automatically Assign Topics to Articles
Contact Support Form
Access Experience Workspaces
Salesforce Knowledge Help and Resources
Plan Your Knowledge Base in Salesforce Classic
Configure the Guest User Profile
Knowledge Article Types

Help Center Set Up Tasks

EDITIONS

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** editions

Help Center is designed with self-service in mind. The Help Center template comes with components and pages that you can use as-is or customize to suit your needs.

Get started with your own publicly accessible Help Center! We've put together a set of tasks and useful references for setting up a Help Center.

Plan Your Help Center	• Give Customers Access to Your Knowledge Base Through Help Center
Enable Knowledge in Your Org and Enable the Knowledge Org Preference	• Enable Salesforce Knowledge

Create and Configure Your Help Center	• Create a Help Center on page 889 • Organize Experience Cloud Sites with Topics on page 691 • Set Up Featured Topics on page 698 • Data Categories Best Practices • Automatically Assign Topics to Articles on page 696 • Contact Support Form on page 319 • Check Out Experience Workspaces • Experience Builder Overview on page 462 • Add more features with Guided Setup • Configure the Guest User Profile for Unauthenticated Users on page 220
Add Branding and Customize Your Help Center Theme	• Customize Your Experience Builder Site • Customize Experience Builder Pages and Components (Builder) • Customize Experience Cloud Site Navigation • Custom Theme Layouts • Brand Your Experience Cloud Site on page 80

Create a Help Center

Set up a help center to give guest users access to the knowledge articles that you choose. Help users find solutions, and give them a way to contact you when the answer isn't available. This topic is for you if your org uses Classic Knowledge.

Before you begin, review the topic, "Introducing Help Center" on page 887, and take the advance steps it discusses.

This topic steps you through help center creation when your org uses Classic Knowledge. Generally, you create your help center site using the Help Center template, and then configure it using a guided setup.

1. In your org, go to **Setup** > **All Sites** and click **New**.
2. Click the **Help Center** tile, and then click **Get Started**.
3. Enter a name for your help center, and then complete the help center URL.
4. Click **Create**.
5. Go to your help center's Experience Workspaces, and click the **Guided Setup** tile. Then click the **Help Center** guided setup tile.
6. On the **Help Center** guided setup tile, click the Guided Setup link.
   This step launches the guided setup. The setup steps you through configuring your help center. Each step includes a link to the location in the help center user interface where you can do the configuration described in the step. Guided setup steps include:
   - Creating topics and assigning featured topics
   - Mapping topics to data categories
   - Setting up a Customer Support page

EDITIONS

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** editions

USER PERMISSIONS

To create a help center

- Create and Set Up Experiences

To work with topics in the site's content management system (CMS)

- Create Topics
- Merge Topics
- Delete Topics
- Edit Topics

- Setting up your Home page
- Configuring search
- Configuring any other pages you want to include in your help center
- Doing some final configuration in the help center's Workspaces
- Previewing and publishing your help center

7. Create topics and assign featured topics.

Topics are the fundamental unit of organization in your help center. Ask your customer support team about the situations they get called about most. Use their ideas to create topics that are of great interest to customers seeking solutions. Have 250 x 250 pixel images on hand for each featured topic. These images add to the look and feel of your help center. Create an FAQ topic that you can use as a default topic. Create an FAQ article for your help center with useful, general information.

a. Go to Experience Workspaces, and click the Content Management tile.

b. Click the **Topics** tab, and then click **Topic Management**.

c. Add topics to your help center.

Topics can be hierarchical, so you can add both topics and subtopics.

d. Still in the Topics area of Content Management, click **Featured Topics** and Set Up Featured Topics on page 698.

8. Map topics to data categories using Automatic Topic Assignment on page 696.

To make your articles visible in the help center, use data categories to automatically assign multiple topics to articles. This step is crucial. Salesforce Knowledge uses data categories to classify articles and make them discoverable. When you map topics to a data category, any article that uses the category also uses the topics that are mapped to it. Check the box for **Assign this Topic to all existing articles**. This step adds help center topics to existing articles and automates publishing to the help center.

9. In Experience Builder, open the Contact Support page, and set up the Contact Support and Case Deflection components.

Your help center offers a Contact Support page that you set up in Experience Builder on page 532. The page comes with Contact Support and Case Deflection components. Case Deflection brings up articles and other resources that are related to the information a guest enters in the contact support form. For the Case Deflection component, set the default topic for "No Content" to your new FAQ topic. When guests come across a topic with no articles, they see your FAQ topic. Assign the FAQ topic to at least one article that contains lots of useful general information.

10. In Experience Builder, configure your home page.

Get your image and HTML files ready to upload. The images are for your help center's logo, login page background, and page header. The header can be a GIF, JPG, or PNG file with a maximum file size of 20 KB. The HTML file is for your page footer.

> Note: Your default view of the help center includes the footer: Powered by Salesforce. You can easily delete it or replace it with your own footer content.

a. Go to **Settings** > **General**, and give your guest user profile read access to your Help Center data categories on page 220.

b. Click  the Theme icon, and configure your theme. Add a logo and login background image, select colors and fonts, and tweak Theme Settings.

c. Configure page components to apply your company's brand to your help center. For example, in the default theme, add images to the Hero Header and Hero Background components.

11. In Experience Builder, open the Home page, click the Global Search for Peer-to-Peer Sites component, and configure its properties on page 360.

Under Autocomplete Search, select **Limit autocomplete search results to Discussions and Articles**.

12. Set up the other pages in your help center to look the way you want.

    Check out these useful help center pages: Topic Detail, Contact Us, and Article Detail. For the Knowledge Article component, clear the **Allow Voting** property. The votes of public users aren't counted.

13. In the Administration Workspace, click **Preferences**, and select **Give access to public API requests on Chatter**.
14. Preview, publish, and activate your help center.
15. Publicize your new help center. For example, share your help center URL with visitors to your company website.

SEE ALSO:

Help Center Set Up Tasks

Change from Help Center to a New Template

Help Center Template Pages

The Help Center template offers a public-facing, self-service portal where guest users can search your knowledge base for answers to their questions. It reduces the load on your customer support staff and gives customers the satisfaction of finding their own solutions.

EDITIONS

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** editions

Included Features

- Ready-made template
- Guided setup configuration
- Publicly accessible
- Self-service
- Curated—you decide which of your Knowledge articles is shared

Included Pages

Template Pages

- Home
- Contact Support
- Error
- Search
- Topic Catalog
- Topic Detail

Object Pages

- File Detail
- File List
- Related Record List

Content Pages

- News Detail

SEE ALSO:

Manage Your Site's Pages and Their Properties in Experience Builder
Page Properties and Types in Experience Builder

Change from Help Center to a New Template

EDITIONS

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** editions

USER PERMISSIONS

To change a help center template

- Create and Set Up Experiences

Changing from a help center template to another template type is a simple process in itself. But the complexity increases with the things you must consider and actions you must take before you make the change. The complexity of a template change varies according to how much original help center content and configuration you want to preserve in the new template. Keep in mind that Salesforce partners have considerable experience with making template changes and can assist you with this process.

Important: Before you change templates in a production environment, try it out in your sandbox first. If you don't try it out in your sandbox, you run a strong risk of losing data, wasting time, and creating unnecessary cost.

In a template change, some objects and configurations are preserved and some aren't.

Preserved after a Template Change

- Featured and navigational topics
- Topic-to-article mapping
- Data category-to-topic mapping
- Data about trending articles and topics
- Topic statistics
- Your help center URL (but keeping the same URL is optional)

Not Preserved after a Template Change

- Your custom pages—There's a workaround. You can export your custom pages before you change templates. After you change templates, you can import them into the new template.
- Specific component configuration—Some configuration is preserved, like featured topics, navigational topics, and topic-to-article mapping. Some configuration isn't preserved, like search and type-ahead search configuration. A template change offers an opportunity to revisit component configuration. For example, in your help center, you let customers search articles and cases. In your new template environment, you can widen your list of searchable objects to make many more object types easy to discover.
- Branding—Before you change templates, consider whether you want to change or preserve brands in the new template. If you decide to keep the same brand, all the image assets used in the original template are available in your org's asset library. You have access to this library in Experience Builder under **Theme** > **Images**.
- Theme—When you change templates, the theme defaults to the new template's theme. You can reuse theme elements from the original template by grabbing them from your org's asset library.
- CSS styles—You can copy your CSS styles under **Theme** > **Edit CSS**, and paste them into a text file. After you switch templates, you can copy-and-paste your CSS from the text file into the new site.

After you preserve the things you want to retain from your original help center, you're ready to change templates.

1. Ensure that you have the latest version of the help center template.
   a. In Create and Set Up Experiences, open **Settings**, and click **Updates**.

b. Confirm that you understand the update changes, and click **Update**.

c. In the confirmation dialog, click **Update**. In the success dialog, click **Close**.

2. In the Administration Workspace, click **Settings** > **Change Template**. A message warns you that changing your site s template permanently deletes all existing customizations and pages.
3. Click the tile for the template you're changing to.
4. Click **Get Started**.
5. In the **Name** field, enter a name for your site.
6. In the **URL** field, enter the value you used for your help center or enter a new value.
7. Click **Create**.

After your new template is in place, bring in the elements from the original help center template that you want to preserve. For example:

- Import the custom pages you exported from your help center.
- Configure page components.
- Apply branding.
- Adjust your theme, including pasting the custom CSS styles you preserved.
- If you had featured topics in the help center, you can drag the Featured Topics component onto your Home page. Your original configuration of the Featured Topics component is preserved in the new template.

SEE ALSO:

Update Your Experience Builder Site's Template

Export a Customized Experience Builder Page in a Lightning Bolt Solution

Considerations for Changing Your Template

Change Your Experience Cloud Site Template

Educate Your Users About Salesforce Experiences

Tell users what to expect from Experience Cloud sites.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

IN THIS SECTION:

Switching Between Your Salesforce Org and Your Experience Cloud Sites

If you use Experience Builder sites and Lightning Experience, use the App Launcher to switch back and forth between your Salesforce org and your Experience Cloud sites. If you use Tabs + Visualforce sites and Salesforce Classic, use the global header. You can embed a site URL directly into buttons or links. You can also redirect a user to another site or to a specific page within another site.

Share Personal Contact Information Within Experience Cloud Sites

Users can specify which information from their profile is visible to external users, such as customers and partners, and guests viewing publicly accessible pages that don't require login.

Search Behavior in Experience Cloud Sites

Search in Experience Cloud sites is different depending on whether your site is using an Experience Builder-based template or a Salesforce Tabs + Visualforce template. In general, searches within an Experience Cloud site return results specific to that site.

Enable Search Autocomplete for Guest Users

Sometimes you want your Experience Cloud site's guest users to benefit from the suggestions that come from autocomplete on their search terms. To make it happen, you must explicitly make result types publicly available. For example, when you want guest users to see suggestions for Knowledge articles, you can set up your search component so that Knowledge results are public. After you set up autocomplete, search shows any Knowledge articles that match a guest user's search terms in autocomplete suggestions.

Manage Your Community Email Notifications

Use email notifications to keep up with important updates in communities.

Chatter in Experience Cloud Sites

Chatter is a social network for holding and preserving discussions in a business, customer site, or other enterprise. But it's not all talk. Site members can use Chatter to engage with your organization, seek expert advice, and revisit relevant discussions. Chatter gives you a direct view into your site, fostering insight and inspiration. Chatter lets you stay focused on your business and the things you want to get done.

Switching Between Your Salesforce Org and Your Experience Cloud Sites

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

If you use Experience Builder sites and Lightning Experience, use the App Launcher to switch back and forth between your Salesforce org and your Experience Cloud sites. If you use Tabs + Visualforce sites and Salesforce Classic, use the global header. You can embed a site URL directly into buttons or links. You can also redirect a user to another site or to a specific page within another site.

Switching between your Salesforce org and your sites doesn't disrupt your workflow. You're returned to the page you were working on, either in the current browser tab (standard apps) or in a new browser tab (connected apps and communities). If you're using the App Launcher or the global header, whichever sites you're a member of are displayed as a dropdown or tile.

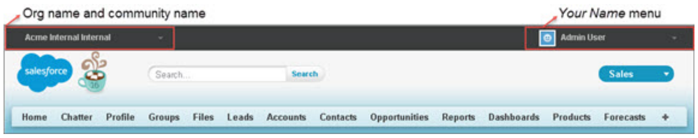
App Launcher for Experience Builder Sites and Lightning Experience

The App Launcher is available based on Experience Builder templates.

In Lightning Experience, the full view of the App Launcher displays a tile for every published site along with your apps. In Experience Builder sites, the App Launcher displays a tile for every published site and app but the All Items area and AppExchange link aren't available. Members see only the sites and apps that they're authorized to see according to their profile or permission sets.

Note: The App Launcher isn't available in Salesforce Tabs + Visualforce sites. Members of these sites can use the global header to switch between their Salesforce org and their sites.

Global Header for Tabs + Visualforce Sites and Salesforce Classic



The menu on the left side lets you switch between sites and your Salesforce org.

- The dropdown shows all the active sites that you're a member of.
- If you have the "Create and Set Up Experiences" permission, you also see previews of sites that you're a member of.
- Internal users who aren't members of any sites only see the company name.
- External users see the dropdown menu only if they belong to more than one active site.
- External users who are members of only one active site don't see the dropdown menu in the site.

Important: Functionality can be affected if you're setting up a My Domain that hasn't finished deployment. For example, if you switch from a site to an internal org, you're directed to the Salesforce login page instead. This can happen when you've logged in using a My Domain URL that has been registered but not yet deployed. Once your domain is deployed, selecting your organization in the dropdown directs you to the internal organization as expected.

The *Your Name* menu on the right side contains links to edit contact information and log out. Internal users can also access Salesforce Help and links to Setup and other tools depending on user permissions and enabled features.

Embedded Site URLs

If you want to allow users to switch between their site and their Salesforce org, you can also embed site URLs into buttons or links.

- Enable the global header to make site URLs visible.
- Copy the URL of the site you want to link to.
- Embed the URL wherever you want it to appear on your site.
- Disable the global header if you want. Users are still able to seamlessly switch from one site to the next without another login.

You can also direct users to a specific page in a site, such as a checkout cart—rather than a homepage. To redirect your customers to a specific page, add the following parameter to your company URL:

/servlet/networks/switch?networkId=<*your 18 digit salesforce site ID, which can be found at the end of the site URL*>&startURL=<*subpath URL of specific page you want to direct customers to*>

Note: The startURL is the specific subpath to the page starting with "/s/"

Important: The site switcher does not work when a user is logged in as another user, for example an admin user who wants to check on a site as a customer user. To switch sites while logged in as another user, go to the contact detail page, click **Login to site as user**, and select the site you would like to log in to. Switching to another site as another user, only works if the specified URL is a root path.

SEE ALSO:

[Enable the App Launcher in Experience Builder Sites]
[Enable the Global Header for Salesforce Tabs + Visualforce Sites]
[Set Up and Manage Experience Cloud Sites]

Share Personal Contact Information Within Experience Cloud Sites

Users can specify which information from their profile is visible to external users, such as customers and partners, and guests viewing publicly accessible pages that don't require login.

When interacting with other Experience Cloud site members, it's important to balance being visible and accessible with protecting your personal contact information. You may not want to show your job title, phone numbers, and other contact details outside of your internal organization. Your customers and partners may not want other customers and partners viewing all their contact information.

Use either the user interface or API to control visibility. You can choose to expose fields to employees only, members of the site from outside your company, or guest users who aren't required to log in. Some fields are always visible to everyone accessing the site. 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 those accessing Experience Cloud sites with community or legacy portal licenses.
- Public—Anyone can view, including guest users viewing publicly accessible pages that don't require login. Guest users can access public pages in sites via the Guest User license associated with each Experience Cloud site.

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 site 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 site. 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`.
- Other partners and customers in the site can't search information in hidden fields on a profile. But users in the company's internal organization can search this type of information.

Note: This setting isn't enforced in Apex, even with security features such as the `WITH SECURITY_ENFORCED` clause or the `stripInaccessible` method. To hide specific fields on the User object in Apex, use the sample code outlined in Comply with a User's Personal Information Visibility Settings.

Default Visibility Settings for Contact Information

This table summarizes the default visibility settings for contact information and your options for restricting visibility.

Contact Information	Default Visibility	Where to Set in User Interface	Options for Restricting Visibility	API Controls on User Object
First Name Last Name Nickname About Me	Public	Go to *Your Name* > **Edit Contact Info**, then click **About**	Everyone sees these fields unless your administrator enables nickname display or creates a custom page that displays this	N/A

Contact Information	Default Visibility	Where to Set in User Interface	Options for Restricting Visibility	API Controls on User Object
			information. 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 sites with publicly accessible pages`	External or public	`UserPreferencesShowProfilePicToGuestUsers`

City
Country
Email
Fax
Mobile Phone
State
Street Address
Work Phone
Zip/Postal Code
	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`
				`UserPreferencesShowEmailToExternalUsers`
				`UserPreferencesShowEmailToGuestUsers`
				`UserPreferencesShowFaxToExternalUsers`
				`UserPreferencesShowFaxToGuestUsers`
				`UserPreferencesShowManagerToExternalUsers`

Contact Information	Default Visibility	Where to Set in User Interface	Options for Restricting Visibility	API Controls on User Object
				UserPreferencesShowManagerToGuestUsers UserPreferencesShowMobilePhoneToExternalUsers UserPreferencesShowMobilePhoneToGuestUsers UserPreferencesShowPostalCodeToExternalUsers UserPreferencesShowPostalCodeToGuestUsers UserPreferencesShowStateToExternalUsers UserPreferencesShowStateToGuestUsers UserPreferencesShowStreetAddressToExternalUsers UserPreferencesShowStreetAddressToGuestUsers UserPreferencesShowWorkPhoneToExternalUsers UserPreferencesShowWorkPhoneToGuestUsers

Search Behavior in Experience Cloud Sites

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Search in Experience Cloud sites is different depending on whether your site is using an Experience Builder-based template or a Salesforce Tabs + Visualforce template. In general, searches within an Experience Cloud site return results specific to that site.

Note: To be searchable in Experience Cloud sites, objects must be searchable in Lightning Experience and supported in templates.

For all Experience Cloud sites:

Search behavior in Experience Cloud sites is different from searches in the internal org:

- In general, searches within an Experience Cloud site return matches from within the site. To find items from a different site, members must leave the current site and search from within the other site.
- In site search results, members can see what they can access through their profiles and permission sets. In addition, they can also view data that is explicitly shared with them in the site context. Shared content can include internal company content and records that aren't explicitly shared with all site members. For example, imagine that the user's profile allows access to accounts, but the accounts tab isn't exposed in the site. The member can still view account data in their search results.
- For user searches performed by external site users, global search and enhanced lookup search (with the **All Fields** option selected) query the following limited set of fields:
  - Name
  - Username
  - User ID
  - Body
  - Email
  - Phone
  - Custom fields

For example, say an external site member searches for a user, John Doe, by his alias `jdoe`. If that term isn't contained in any of the searchable fields in the user object, John Doe's record isn't included in search results.

- Search results include all the records and files that a site member can access. Results include records that aren't explicitly exposed in the site or records and files that members can access in the internal Salesforce org. In file searches, users can see:
  - Files that they own
  - Files that are shared with them directly
  - Files that they can access in a library
  - Files that are posted to a record they have access to
  - Files that are posted to groups or shared with that site
- The admin must enable search result filters for an object in the internal org for it to be searchable in a site. To make custom objects searchable, the object must be related to a tab in the internal org.
- In addition to an object needing to be marked as searchable, a little more setup is required to make objects discoverable by guest users. For more information, see Enable Search Autocomplete for Guest Users on page 901.
- With global search from your internal org, you can get uneven results when searching for a site User record. Here's why and what you can do about it. Each site has a unique network ID. When you create a site user through **Contact record** > **Create External User**, the new User record is assigned to a site's network ID.

  Global search looks for records in the internal org, which has a different network ID than the site. A global search doesn't search inside site. Since the User record is associated with a site network ID, global search doesn't return results for that record.

  The workaround is to create User records in the internal org, and then associate the records to a site. You can associate an internal User record to a site by linking the internal record to a Contact record. After you forge the link, you can find the User record through global search. The User record's network ID is now associated with the internal org.
- For guest users, a case deflection search matches article titles only. It doesn't return matches from the body of the article.

For Experience Builder sites using the Koa and Kokua templates:

- The Featured Search component lets site members search for articles within a specific data category.
- The Article List component shows the search results based on the search term entered in Featured Search.

Note: As part of their phased retirement, from Summer '17, you can no longer use the Koa and Kokua templates. Salesforce still supports existing Experience Builder sites that were built using Koa and Kokua. To create a site based on Koa or Kokua, contact Salesforce Support. However, we recommend that you work with Salesforce Support on a plan to replace your existing Koa and Kokua sites. The latest Experience Builder templates provide richer support for Knowledge and case management.

For Experience Builder sites using the Customer Service template:

- The Search Publisher component lets site members enter search terms in the site.
- The Search Results component shows a list of search results limited to articles and discussions.

  Note: Only articles that have a topic related to them in Topic Management populate in the Search Results component.
- The Global Search Results component lets members see search results in one tab (All). Results can also be shown on separate tabs for cases, accounts, contacts, feeds (discussions), and any other object that's exposed in the site that members can access. Such objects include custom objects..

  Note: Admins must associate a tab to a custom object to make it searchable in global search.
- The Search & Post Publisher component gives admins the option to set up autocomplete search results. These suggested search results populate based on objects made searchable in the site, and included in autocomplete search.

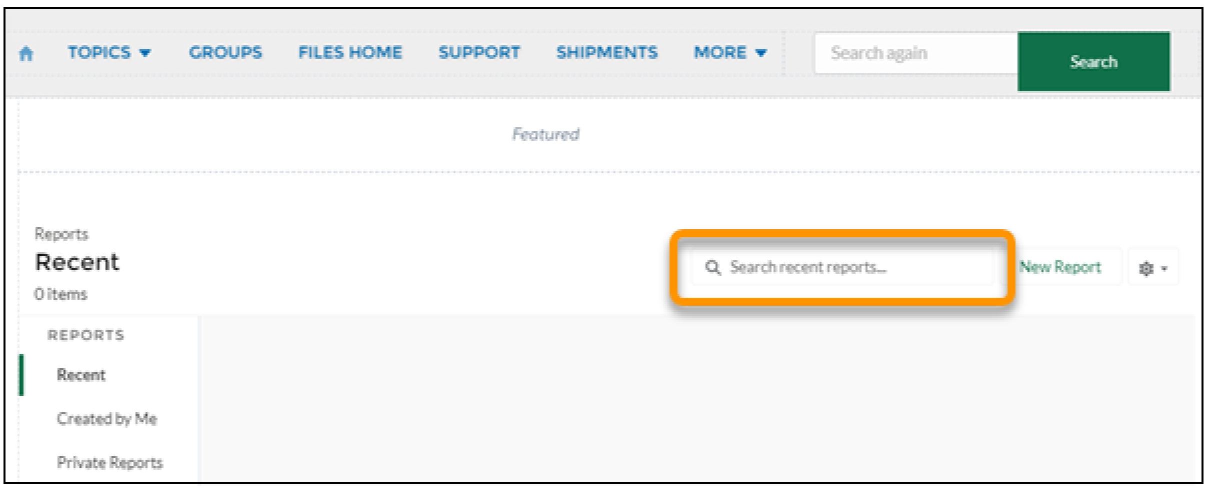
For all Experience Builder sites:

Users in a site can filter their search results for the following objects: accounts, knowledge articles, cases, contacts, dashboards, files, leads, opportunities, people, and tasks. Search filtering for sites is on by default in your Salesforce org. From Setup, in the Object Manager, go to Search Layouts for each object you want to filter. Add the fields that users want to filter to the Search Results layout. Supported field types are checkbox, phone number, picklist, text, and URL. You can't filter encrypted fields.

> Note: Filtering on knowledge articles is a beta feature. As a beta feature, filtering on knowledge articles is a preview and isn't part of the "Services" under your primary subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only based on generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature.

For Salesforce Object pages in Experience Cloud sites:

Salesforce Object pages have their own search field. This search returns results that match search terms exactly as-phrased and in the order that they're entered. For example, when you search for ABC, ABC is returned, but (ABC) isn't.



> Note: Salesforce Object pages are custom pages that are based on a Salesforce object. For example, when you create a page for reports, you get the object pages Report Detail, Report List, and Report Related List.

For sites using Salesforce Tabs + Visualforce:

- If Chatter is enabled in your org, global search and contextual feed search are enabled by default in all sites.
  - With global search, members can search for records, files, people, groups, topics, and feed posts and comments.
  - Feed search ( ) is helpful when members want to look for information in a specific feed context. Groups, user profiles, records, and the site feed support feed search.
- If Chatter isn't enabled, sidebar search is enabled in all Salesforce Tabs + Visualforce sites.
  - Sidebar search doesn't support searches for items specific to Chatter, such as feeds, groups, files, topics, and user profiles.

SEE ALSO:

Configure Search Results

Enable Search Autocomplete for Guest Users

USER PERMISSIONS

To configure component properties:

- Customize Application

Sometimes you want your Experience Cloud site's guest users to benefit from the suggestions that come from autocomplete on their search terms. To make it happen, you must explicitly make result types publicly available. For example, when you want guest users to see suggestions for Knowledge articles, you can set up your search component so that Knowledge results are public. After you set up autocomplete, search shows any Knowledge articles that match a guest user's search terms in autocomplete suggestions.

1. In Experience Builder, click a search component.

   Autocomplete properties are available on most search components.

2. In the search component property editor, open the Autocomplete section and click an object.

   The object that you click is an object type that you want to make visible to guest users in search results. When you click an object, a window opens where you can select a different object type. So keep your original selection, or change it here.

3. Select **Publicly available**.
4. Click **Save**.

Manage Your Community Email Notifications

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Use email notifications to keep up with important updates in communities.

You can choose to receive email notifications whenever someone posts on your profile, comments after you on a post you've commented on, posts to a group you belong to, and more. Email notification preferences are set by community.

To set your email preferences, go to your profile page within a community, click the dropdown button (▾) in the upper-right corner and select **My Settings**, then click **Email Settings**. You can turn individual notifications on or off.

Your chosen settings apply to the current community. If you don't belong to any groups yet, you won't see the option to set groups on this page until after you join your first group. You can also set your group email preferences using the **Email Me...** dropdown on each group's page. You can choose to receive a daily or weekly digest email or an email every time someone posts. This option is visible if you're a group member.

Your email options are similar to the Chatter email settings in your internal organization under your personal settings (`Your Name` > **My Settings** > **Email Settings** for Chatter Free users). Within communities, however, note the following differences.

Warning: Avoid spamming new group members in a community, especially if you are adding group members en masse. Deselect the following org-wide Chatter email notifications: **Allow Emails** and **Allow Posts via Email**. Access these settings by searching `Email Settings` in the **Quick Find** search box in Salesforce Setup.

- The default notification frequency for new groups you join can't be set via the user interface. It can be set only via Salesforce APIs (SOAP API and REST API).
- Personal digests aren't currently available.
- You don't receive notifications when new articles are added to topics.
- If your community has Chatter messages enabled, you're notified of file shares in a message. If Chatter messages aren't enabled, you are notified of file shares by email.
- If flagging is enabled in the community, the `Flags an item as inappropriate` option appears for all members of the community, but only sends notifications if:
  - You're a group owner or manager and a member flags a post, comment, or file in your group.

- You're a moderator and a member flags a post, comment, or file you have access to. Depending on the type of notification you want to receive, you also need following permissions:

Email Notifications About	Required Permission
Flagged posts and comments	"Moderate Community Feeds"
Flagged files	"Moderate Community Feeds"
Flagged Chatter messages	"Moderate Community Feeds" and "Moderate Communities Chatter Messages"
Flagged direct messages	"Moderate Communities Chatter Messages"

If the **Flag as Inappropriate** link doesn't work in your email, try flagging the message from the UI.

SEE ALSO:

Navigate to Chatter Email Settings

Chatter in Experience Cloud Sites

Chatter is a social network for holding and preserving discussions in a business, customer site, or other enterprise. But it's not all talk. Site members can use Chatter to engage with your organization, seek expert advice, and revisit relevant discussions. Chatter gives you a direct view into your site, fostering insight and inspiration. Chatter lets you stay focused on your business and the things you want to get done.

In Experience Cloud sites, where Chatter is often referred to as *feeds* or *discussions*, lots of extra features that support customer and partner communities are available. For example, use threaded discussions to add dimension to your feeds by including the power to reply to answers and comments. Enable company verification to put your organization's stamp of approval on an answer to a customer question. Use streams to join multiple feeds together into one mega-feed. Use direct messages to create a break-out session with a customer or partner needing individual attention.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

IN THIS SECTION:

Who Can See What in Communities

Communities contain different user types who require varying levels of access. What users can see in a community depends on their user type and which tabs the administrator selects when creating the community. This topic offers a set of tables that describe what users with different access levels can see and do with different community features.

Threaded Discussions in an Experience Builder Site

When you talk to people, it's rarely like a feed, where one person asks a question and everyone else answers. In real life, when one person asks a question, someone answers, and then there's a reply to that answer, and a reply to that reply. With threaded discussions, you can participate in this lively flow in your sites.

Close a Conversation in an Experience Builder Site

The question is answered, the topic discussed, the poll decided—what do you do now? You end the conversation. Admins, moderators, and permitted members can close a question, poll, or post in an Experience Builder site. And, if needed, they can reopen it. It's a nice way to stop the churning on a settled matter.

Chatter Streams in Experience Builder Sites

Your Experience Builder site members can combine multiple feeds into a stream to create a single point of access to related information. Combine feeds of top contributors or discussions concerning a particular product line. Create a stream that combines feeds from discussions, groups, topics, profiles, and all kinds of objects, like cases, opportunities, and accounts. No more jumping from feed-to-feed to figure out what people are saying. Each member can create up to 100 streams.

View Experience Builder Site Streams from Your Internal Salesforce Org

Site members who have access to their internal Salesforce org can view their site streams from the org. When you click most site-based links from the internal org view, they lead right back to the site.

Share a Link to the Detail View of a Post

The Share feature on a feed post includes a Copy Link option. Use it to grab a link that jumps directly to the detail view of a post. Copying places the link on your clipboard. You can paste the link wherever you like.

SEE ALSO:

- Enable Code Snippets and Assign Permissions to Use Them
- Rename the Chatter Tab
- Assign Post Pinning Permission
- Assign Permission to Verify Answers for Your Company
- Enable Upvotes and Downvotes
- Add Rich Publisher Apps to Your Feeds

Who Can See What in Communities

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Communities contain different user types who require varying levels of access. What users can see in a community depends on their user type and which tabs the administrator selects when creating the community. This topic offers a set of tables that describe what users with different access levels can see and do with different community features.

> Note: The behavior that's described in these tables doesn't consider updates to the community 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, Customer Community, Lightning External Apps, or Lightning External Apps Plus license)**
Administer communities in Salesforce	Can create communities, customize tabs and branding, add or remove members, and	Not available	Not available

	Administrator or Salesforce user with "Create and Set Up Communities" permission	Salesforce Community Member (all Salesforce licenses including Chatter Free and Chatter Only)	External Community Member (Customer Portal, Partner Portal, Partner Community, Customer Community, Lightning External Apps, or Lightning External Apps Plus license)
	activate or deactivate a community. User must also have the "Customize Application" permission to create or customize communities.		
Global Header (for use in Salesforce Classic orgs)	The dropdown in the global header shows a list of communities the user created or can access. Also links back to their internal organization. Can access setup for all communities, regardless of status. Can see communities in `Preview` status.	The dropdown in the global header shows a list of communities that the user created or can access. Also links back to their internal organization. Can't access communities in `Inactive` status. If a link is provided, can see communities in `Preview` status.	The dropdown in the global header shows a list of communities that the user can access. Can't access communities in `Inactive` status. If a link is provided, can see communities in `Preview` status.
`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 can access. 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 can access. This overlay is different from the My Settings page that other internal users see if the organization has enabled the improved Setup user interface.
Access to Experience Workspaces or Community Management menu in Global Header	Admins or users with "Manage Communities" can see the menu and use it to preview the community. Such users can also access community settings in	Users with "Manage Communities" can see the menu and use it to preview the community or access Experience Builder, Site.com Studio, and	Not available

	Administrator or Salesforce user with "Create and Set Up Communities" permission	Salesforce Community Member (all Salesforce licenses including Chatter Free and Chatter Only)	External Community Member (Customer Portal, Partner Portal, Partner Community, Customer Community, Lightning External Apps, or Lightning External Apps Plus license)
	Experience Builder, Site.com Studio, and Lightning Platform. The Experience Builder option doesn't appear for communities created from the Salesforce Tabs + Visualforce template. This menu only appears within Community Management.	Lightning Platform. The Experience Builder option doesn't appear for communities created from the Salesforce Tabs + Visualforce template. This menu only appears within Community Management.	
Salesforce Help	Can see Salesforce Help.	Standard Salesforce user sees Salesforce 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 see only the 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 that they own, and records that they have access to (based on sharing rules) across all communities and their internal org.	Standard Salesforce user sees records that they own, and records that they have access to (based on sharing rules) across all communities and their internal organization. Chatter Free user can't access records.	Can see records that they own, and records that they have access to (based on sharing rules and permissions) across all communities.
Dashboards and Reports	Can view and create dashboards and reports		Role-based external users can create and edit reports in communities, but not in portals. However, there are some exceptions. For more information, see Set Up Report Management for External

	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, Customer Community, Lightning External Apps, or Lightning External Apps Plus license)
			Users—Create and Edit Reports. All role-based external users can refresh dashboards.
Salesforce Knowledge Articles	Salesforce Knowledge User License, `Read` permission on the article type, and visibility on the category.	Salesforce Knowledge User License, `Read` permission on the article type, and visibility on the article's category.	Visibility on the article's category.
Community User Visibility	Can set visibility on a community-by-community basis, by checking **See other members of this community**. Once checked, members of that community can see each other and members of other communities that they belong to that also have enabled community user visibility.	If enabled, members can see other members within their community and members of other communities that they belong to that have selected **See other members of this community**.	If enabled, members can see other members within their community and members of other communities that they belong to that have selected **See other members of this community**.

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, Customer Community, Lightning External Apps, or Lightning External Apps Plus license)
Groups	Within a community, a user can see all groups for that community and join them. The user can't see groups from other communities they belong to or their internal org. Can create 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	Within a community, a user can see all groups for that community and join them. The user can't see groups from other communities that they belong to or from their internal org. Can create groups. In groups user is a member of, can post, comment, post files or links, or share someone else's post.	Within a community, a user can see all groups in the community and join them. The user can't see groups from other communities that they're a member of. Can create 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, Customer Community, Lightning External Apps, or Lightning External Apps Plus license)
	organization and external users can create groups through the "Create and Own New Chatter Groups" user permission.		
Files	Regardless of the current community, users see all their files. They see the files that they own, that are shared with them directly, that they can access in a library, or that are posted to a record that they can access. Files posted to groups and shared with an entire community can be viewed only in that community. There's a difference between when files are *visible* and when they're *shareable* through feeds. **Visible:** Files in libraries are visible, regardless of the community where the files were uploaded. For a file on a record to be visible, the community must be able to access the record and the library that the file is in. **Shareable:** A user can share a file across communities if they are sharing to a record and the file is in a library. A file can be shared to a Chatter group only within the same community where it was originally uploaded. A user can't share a file from the file detail page in communities, even for files that can be shared through Chatter.		Regardless of the current community, users see all their files. They see the files that they own, that are shared with them directly, or that they can access in a library. Portal users see files that are posted to records that they can access, unless the record post was marked "Internal Only". There's a difference between when files are visible and when they're shareable through the Chatter publisher. Files in libraries are visible, regardless of the community where the files were uploaded. A user can share files across communities through the Chatter publisher as long as those files are in libraries that the user can access. However, they can share files that aren't in libraries only within the community where the files were uploaded.
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.		

	Salesforce Administrator	Salesforce Community Member (all Salesforce licenses including Chatter Free and Chatter Only)	External Community Member (Customer Portal, Partner Portal, Partner Community, Customer Community, Lightning External Apps, or Lightning External Apps Plus license)
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 per community. Within a community, users can control their Chatter email notifications in their personal settings. Can control email notifications for their internal organization from their personal settings. (Enter `Chatter` in the `Quick Find` box, then select **Email Notifications**.) 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.	Email notification preferences are set per 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 their personal settings. (Enter `Chatter` in the `Quick Find` box, then select **Email Notifications**.) Chatter Free user can control Chatter emails for their communities under `Your 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	Email notification preferences are set per 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 groups exceed 10,000 members. All members who had this option selected are automatically switched to daily digests.

	Salesforce Administrator	Salesforce Community Member (all Salesforce licenses including Chatter Free and Chatter Only)	External Community Member (Customer Portal, Partner Portal, Partner Community, Customer Community, Lightning External Apps, or Lightning External Apps Plus license)
		automatically switched to daily digests.	
Topics	Can see hashtag topics and Chatter topics for the current community only. Topics are visible in feeds, the topics list, topic detail pages, Trending Topics, and Recently Talked About topics.		
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 that they have sent or received in their internal org and any communities that 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. The API allows users to send Chatter messages across communities.	In their list of Chatter messages, can see private messages that they have sent or received in their internal org and any communities that 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 that 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. When using Chatter messages in communities, ensure that the Chatter tab is enabled.
Messenger (Chat)	Messenger is not available with Communities.		

Feeds Visibility

This 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, Customer Community, Lightning External Apps, or Lightning External Apps Plus license)
Post on a record	Can post on any records within the community.	Can post on any records within the community that the user can access.	Can post on any records within the community that the user can 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. This table describes what each type of community user can see in search results.

Search Results For	Administrator	Salesforce Community Member	External Community Member (Customer Portal, Partner Portal, Partner Community, Customer Community, Lightning External Apps, or Lightning External Apps Plus license)
People Users	People specific to the current community. • Other partners and customers in the community can't search information in hidden fields on a profile. But users in the company's internal organization can search this type of information. • 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 (**All Fields** selected) query the following limited set of fields on user records: – Name – Username – User ID – Body – Email – Phone		

Search Results For	Administrator	Salesforce Community Member	External Community Member (Customer Portal, Partner Portal, Partner Community, Customer Community, Lightning External Apps, or Lightning External Apps Plus license)
	– Custom fields Note: With global search from the internal org, uneven results can occur when searching for a community User record. Here’s why and what to do about it. Each community has a unique network ID. When a community user is created through **Contact record** > **Create External User**, the new User record is assigned to a community's network ID. Global search looks for records in the internal org, which has a different network ID than the community. A global search doesn't search inside communities. Since the User record is associated with a community network ID, global search doesn't return results for that record. The workaround is to create User records in the internal org, and then associate the records to a community. It’s possible to associate an internal User record to a community by linking the internal record to a Contact record. After the link is forged, the User record is discoverable through global search. The User record's network ID is now associated with the internal org.		
Groups	Groups specific to the current community.		
Files	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 can access Files owned by a user are always visible in search results for that user, regardless of how they were uploaded.		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 can access Files owned by a user are always visible in search results

Search Results For	Administrator	Salesforce Community Member	External Community Member (Customer Portal, Partner Portal, Partner Community, Customer Community, Lightning External Apps, or Lightning External Apps Plus license)
			for that user, regardless of how they were uploaded.
Topics	Topics specific to the current community.		
Feeds	Feed posts and comments from within the community where the search is performed. Global search returns information from all feed contexts. Contextual feed search ( ) returns information from the context where the search is performed. For example, results can come from the context of a feed on a user 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 that the user can access through their user profile or permission sets across all communities and in the internal organization.	Visibility for all items that the user can access 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 the partner portal license also see the owner of the portal account. The Recently Viewed Users list in the lookup shows all users that they can access via their license, profile settings, permission sets, and sharing rules. If user sharing is enabled in the org, this behavior varies depending on how it's configured. For external community members, enhanced user lookups search within a limited

Search Results For	Administrator	Salesforce Community Member	External Community Member (Customer Portal, Partner Portal, Partner Community, Customer Community, Lightning External Apps, or Lightning External Apps Plus license)
			set of fields when the **All Fields** option is selected.
Look-up searches on records	Full visibility for all items across all communities and the internal org.	Visibility for all items that the user can access through their user profile or permission sets across all communities and the internal org.	Visibility for all items that the user can access through their user profile or permission sets across all communities.
Look-up searches in Community Management	Lookups in Community Management and Experience Workspaces initially return the items that the user most recently viewed from within the community. If an object that the user is looking for isn't in the Recently Viewed Documents list, they can try typing all or part of the object name and searching again.	No	No
Salesforce Knowledge Articles	Salesforce Knowledge User License, `Read` permission on the article type, and visibility on the category.	Salesforce Knowledge User License, `Read` permission on the article type, and visibility on the article's category.	Visibility on the article's category.

Differences Between the Full Salesforce Site and the Salesforce Mobile App

There are minor differences in the Communities experience between the full site and the Salesforce mobile app. From an object page:

- the Salesforce mobile app displays a recently viewed list only for the selected object.
- The full site displays a recently viewed list that can be changed to display any recently viewed objects.

Note: Community users on the Salesforce mobile app are shown the default list view that's specified for the object. Whether Salesforce mobile app users see a recently viewed list depends on the default list view chosen. The recently viewed list doesn't appear for custom objects.

SEE ALSO:

Set Up and Manage Experience Cloud Sites

Threaded Discussions in an Experience Builder Site

When you talk to people, it's rarely like a feed, where one person asks a question and everyone else answers. In real life, when one person asks a question, someone answers, and then there's a reply to that answer, and a reply to that reply. With threaded discussions, you can participate in this lively flow in your sites.

EDITIONS

Available in: Experience Builder sites

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

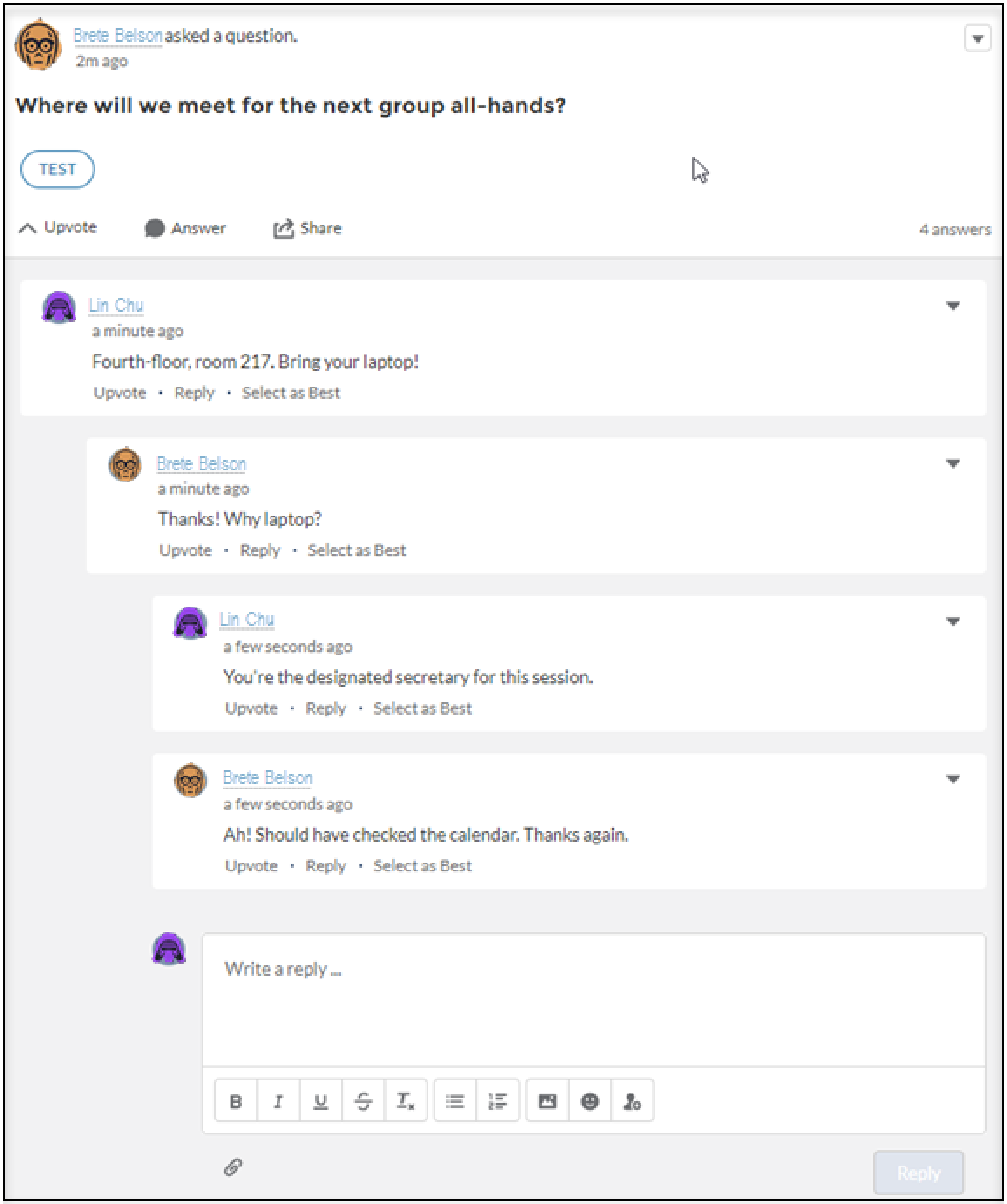
USER PERMISSIONS

To enable threaded discussions in a site:

- Enable Chatter

  AND

  Create and Set Up Experiences



A thread is any feed item that has one or more levels nested under it. For example, a question with an answer or a comment with a reply is a thread. When you enable threaded discussions in your site, all discussions convert to threaded discussions: Members can comment on a post, answer a question, and reply to those comments and answers. Discussions are indented up to three levels to clarify who is responding to what.

The notification emails you receive for threaded discussions link more deeply into the discussion. All notification links used to go to the top of the thread; now they land you on new thread content.

To prevent the loss of important content, in orgs created after Winter '19 most site members are blocked from deleting discussion threads.

For orgs created after Winter '19, blocking is the default behavior. Orgs that existed before Winter '19 can call Salesforce Customer Support to enable blocking. When blocking is enabled, only feed moderators and users with the Modify All Data permission can delete threads.

We recommend blocking deletions because, when deletion is **not** blocked:

- A user who creates a feed item can delete **any** response nested under it.
- A user who deletes a feed item also deletes **all** responses nested under it.

If nothing is nested under a feed item, the author can always delete the item.

IN THIS SECTION:

Enable Threaded Discussions in an Experience Builder Site

Enable a preference in the Administration Workspace to change all site discussions to threaded discussions. Threaded discussions add the Reply feature to feeds. In addition to commenting on a post or poll or answering a question, you can reply to an answer or a comment. Threaded discussions are indented up to three levels to clarify who is replying to what.

EDITIONS

Available in: Experience Builder sites

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To enable threaded discussions in a site:
- Enable Chatter

  AND

  Create and Set Up Experiences

> **Important:** To prevent loss of important content, orgs created after Winter '19 block the deletion of feed items that have something nested under them. For example, when a question has an answer, deletion of the question is blocked.
>
> For orgs created after Winter '19, blocking is the default behavior. Orgs that existed before Winter '19 can call Salesforce Customer Support to enable blocking. When blocking is enabled, only feed moderators and users with the Modify All Data permission can delete site threads.
>
> We recommend blocking deletions because, when deletion is **not** blocked:
>
> - A user who creates a feed item can delete **any** response nested under it.
> - A user who deletes a feed item also deletes **all** responses nested under it.
>
> If nothing is nested under a feed item, the author can always delete the item.

Enable threaded discussions in your site in the Administration Workspace.

1. Open Experience Workspaces, and click the Administration Workspace.
2. Go to the Preferences page, and select **Allow discussion threads**.

3. Click **Save**.
   All discussions in your site convert to threaded discussions: In addition to comments and answers, members can reply to comments and answers. Discussions are indented up to three levels to clarify who is responding to what.

Delete a Discussion Thread in a Community

Deleting a discussion thread is the same as deleting any feed item with something nested under it. The thing to consider is whether deletion is blocked in your community. To prevent loss of important content, orgs created after Winter '19 block most community members from deleting feed items that have something nested under it. For example, when a question has an answer, deletion of the question is blocked.

For orgs created after Winter '19, blocking is the default behavior. Orgs that existed before Winter '19 can call Salesforce Customer Support to enable blocking. When blocking is enabled, only feed moderators and users with the Modify All Data permission can delete community threads. If nothing is nested under a feed item, the author can always delete the item.

We recommend blocking deletions because, when deletion is **not** blocked:

- A user who creates a feed item can delete **any** response nested under it.
- A user who deletes a feed item also deletes **all** responses nested under it.

1. Open the actions menu on a feed item.
2. Select **Delete**, and then confirm the deletion.
   When delete is **not** blocked, the feed item and everything nested under it are deleted. When delete **is** blocked, the item is deleted only under these conditions: The item has nothing nested under it and you are its author, or you have the right role or permission.

EDITIONS

Available in: Lightning communities

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To delete a discussion thread in a community:

- Modify All Data

  OR

  Moderate Community Feeds

  OR

  Salesforce disabled block-delete at your org's request

  AND

  You are the author of the post, question, comment, or reply

Close a Conversation in an Experience Builder Site

EDITIONS

Available in: Experience Builder sites

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To assign close conversation permission to a user in a site:

- Enable Chatter

  AND

  Create and Set Up Experiences

The question is answered, the topic discussed, the poll decided—what do you do now? You end the conversation. Admins, moderators, and permitted members can close a question, poll, or post in an Experience Builder site. And, if needed, they can reopen it. It's a nice way to stop the churning on a settled matter.

Closing conversations is available in group, topic, discussion, and user profile feeds in your Experience Builder sites. Admins and moderators can close posts, polls, and questions without any special configuration. Admins can assign the Close Conversation Threads permission to site members.

Note: When a conversation is exposed in your internal org, for example, through a cross-site stream, the conversation's open or close status is respected.

After a thread is closed, some actions are available to all and some actions are available only to admins and authorized members. This table outlines who can do what after a feed item is closed.

Action	Availability on a Closed Conversation
Add a comment	Blocked
Answer a question	Blocked
Vote on a poll	Blocked
Edit a feed item or its comments or answers	Blocked to author; available to admins, moderators, and people with the Close Conversation Threads permission
Edit a topic	Available
Delete a feed item or its comments or answers	Blocked to author; available to admins, moderators, and people with the Close Conversation Threads permission Note: If a user has the Close Conversation Threads permission, they can delete feed items whether the conversation is open or closed.
Publish a pending review comment (site moderation)	Available to admins and moderators
Like or unlike; upvote or downvote	Available
Select or remove a best answer	Blocked to author; available to admins, moderators, and people with the Close Conversation Threads permission
Company verify; remove verification	Available only to people with the Verify Answers to Chatter Questions permission
Flag	Available
Share	Available
Bookmark	Available
Mute and unmute	Available

Action	Availability on a Closed Conversation
Escalate to case	Available only to people permitted to escalate a feed item to a case

IN THIS SECTION:

Assign Close Conversation Permission Through a Permission Set

To permit Experience Builder site members to close a conversation, assign the permission Close Conversation Threads in Feeds.

Assign the Close Conversation Threads permission in Setup through permission sets.

1. In Setup, enter `Permission Sets` in the `Quick Find` box, then click **Permission Sets** in your results.
2. Open the permission set you plan to use.
3. Open System Permissions.
4. Select **Close Conversation Threads**.
5. Assign the permission set to the site members who can close site posts, questions, and polls.

SEE ALSO:

[Assign Permission Sets to a Single User]
[Create Permission Sets]

EDITIONS

Available in: Experience Builder sites

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To assign close conversation permission to a user in a site:

- Enable Chatter

  AND

  Create and Set Up Experiences

Assign Close Conversation Permission Through a User Profile

To permit Experience Builder site members to close a conversation, assign the permission Close Conversation Threads in Feeds.

Assign the Close Conversation Threads permission in Setup through user profiles.

> **Note:** Before you assign the Close Conversation Threads permission, you must enable Chatter for your org or you must enable profile-based rollout of Chatter. In either case, you must then enable Chatter on the user profile where you plan to set up close conversation permission. You can enable Chatter on the profile as part of step 3 of this task.

1. In Setup, enter `Profiles` in the `Quick Find` box, then click **Profiles** in your results.
2. Click **Edit** next to the user profile you plan to change.
3. > **Note:** You can't edit standard user profiles. You can edit custom profiles, and you can clone a standard profile and edit the clone.

   Under Administrative Permissions, select **Close Conversation Threads**.
4. If the profile isn't already assigned, assign it to the site members who close site posts, questions, and polls.

EDITIONS

Available in: Experience Builder sites

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To assign close conversation permission to a user in a site:

- Enable Chatter

  AND

  Create and Set Up Experiences

SEE ALSO:

Edit Users

Close a Post, Poll, or Question in Experience Builder Sites

Admins, moderators, and permitted members can close a question, poll, or post to most new activity in an Experience Builder site. And, if needed, they can reopen it.

With the right permissions, you can close conversations in group, topic, discussion, and user profile feeds. The close action is available on the post, question, or poll's overflow menu in both the full feed and the feed item's detail view.

EDITIONS

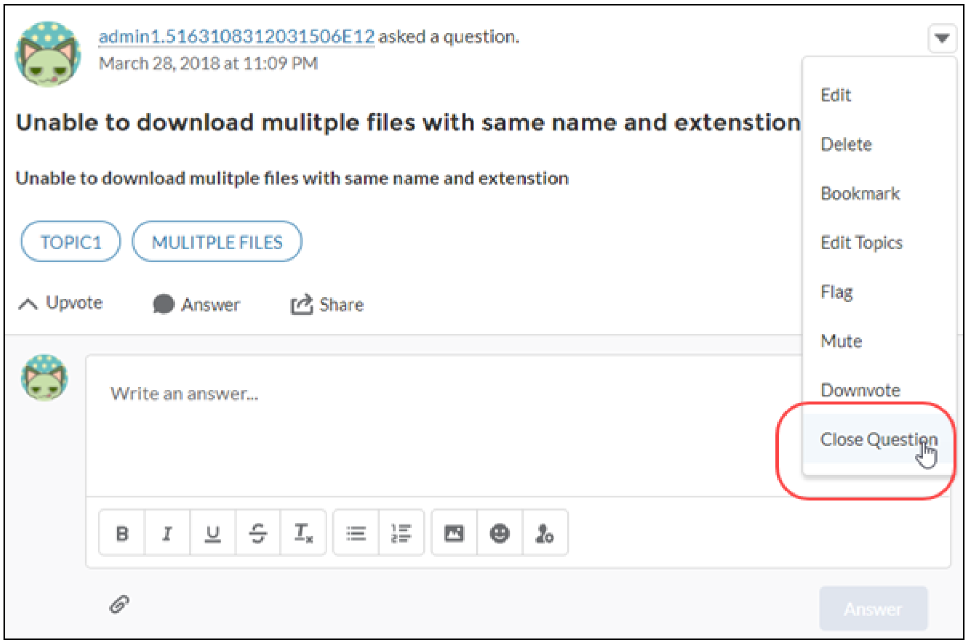
Available in: Experience Builder sites

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To close a conversation, in a site:

- Close Conversation Threads



1. Go to the feed item, for example, a question, poll, or post, and open its overflow menu.
2. To close a question, select **Close Question**; to close a post, **Close Post**; to close a poll **Close Poll**.
   The feed item is closed to most new actions.

   Note: When a feed item is closed, the overflow menu shows open options, for example, **Open Question**, **Open Post**, and **Open Poll**.

Chatter Streams in Experience Builder Sites

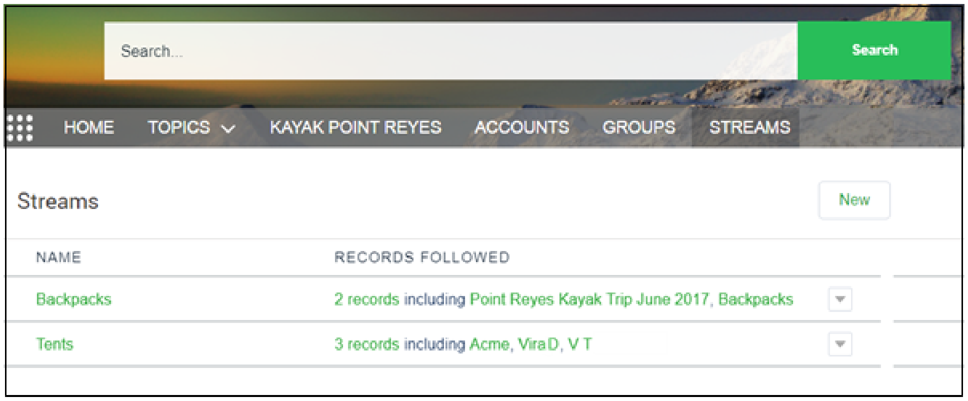
EDITIONS

Available in: Experience Builder sites

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Your Experience Builder site members can combine multiple feeds into a stream to create a single point of access to related information. Combine feeds of top contributors or discussions concerning a particular product line. Create a stream that combines feeds from discussions, groups, topics, profiles, and all kinds of objects, like cases, opportunities, and accounts. No more jumping from feed-to-feed to figure out what people are saying. Each member can create up to 100 streams.

Note: Currently, activity on a topic's feed in a stream doesn't trigger notifications.



Each site member has their own view of the Streams page where they see their own streams. On the Streams page, members can create streams and use row actions menus to edit and delete their streams.

If you find yourself moving between your sites and your internal Salesforce org, you can see your site streams in your org. For more information, see View Experience Builder Site Streams from Your Internal Salesforce Org on page 927.

IN THIS SECTION:

Add a Chatter Stream in an Experience Builder Site

Add a stream through your Experience Builder site's Streams home page. The Streams home page has controls for creating and managing streams.

Delete a Chatter Stream in an Experience Builder Site

When a stream has lived out its useful life, you can easily delete it from your list of streams in an Experience Builder site. Deleting a stream doesn't delete the records or posts it contains. It deletes only the stream, which frees up space for you to create more streams.

Edit a Stream in an Experience Builder Site

Edit a stream to add feeds to it or remove feeds from it in an Experience Cloud site. You can also change the stream's name and its notifications setting.

Add a Chatter Stream in an Experience Builder Site

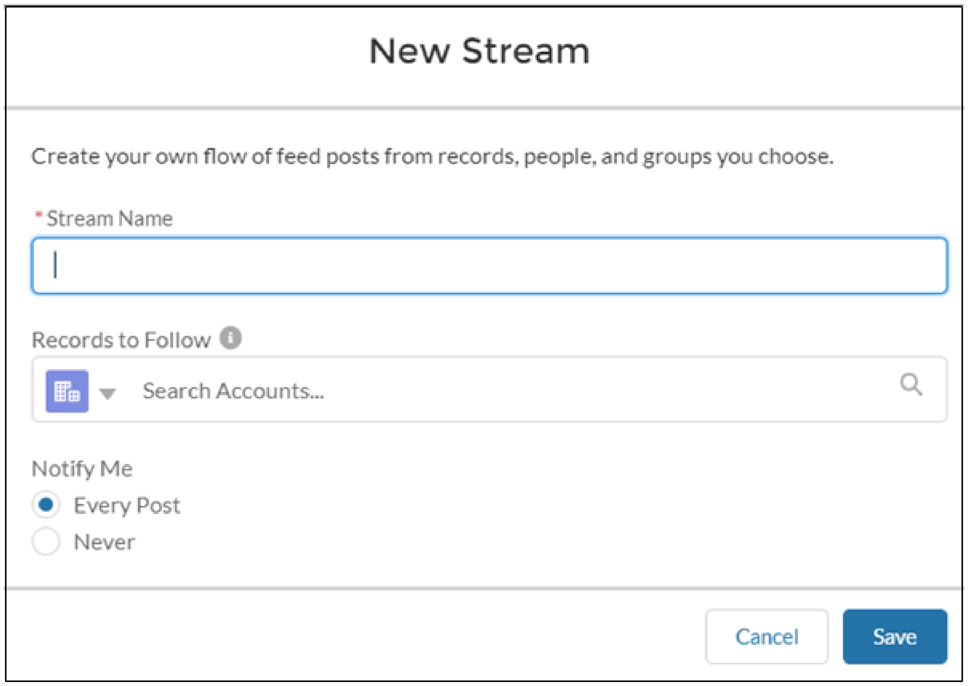
EDITIONS

Available in: Experience Builder sites

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Add a stream through your Experience Builder site's Streams home page. The Streams home page has controls for creating and managing streams.

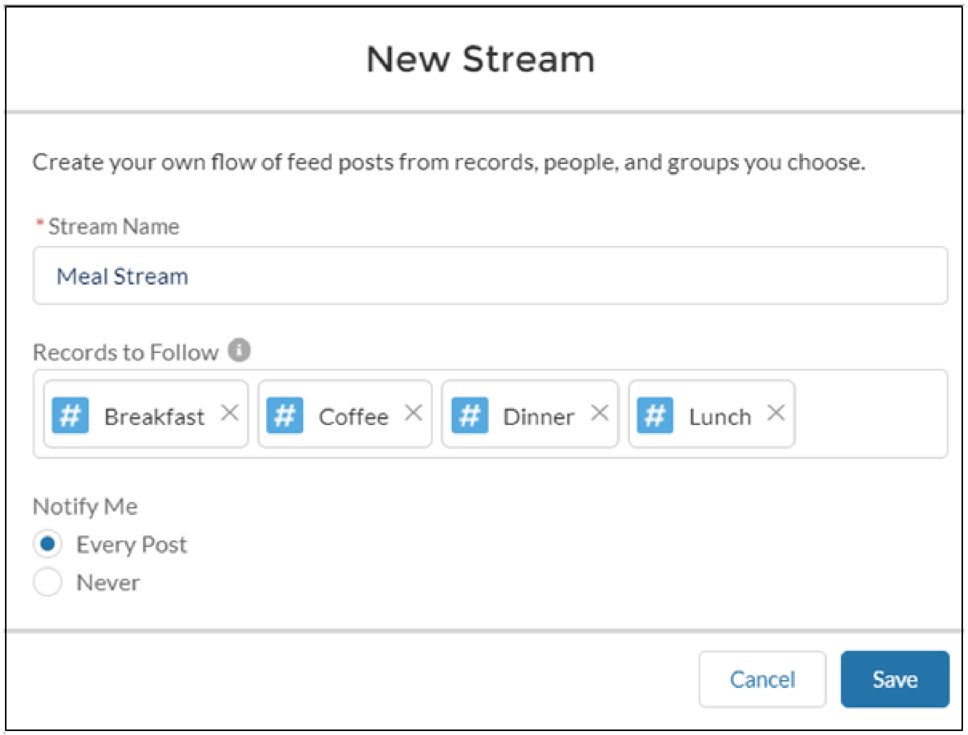
1. Open the Streams page, and click **New**.
2. In the New Stream dialog, enter a name for your stream.



3. Under **Records to Follow**, select a type of feed you want to add to this stream.

   Note: Knowledge articles (KAs) aren't fully supported in streams. You can add them when you create and edit a stream by searching for the article's ID number rather than its title. But you can't add a KA to a stream from its Follow button like you can with other record types. Articles added to Streams using the article's ID don't appear in Records to Follow on the Stream's edit page. KAs also don't appear when viewing the Follow button details on the article's detail page.

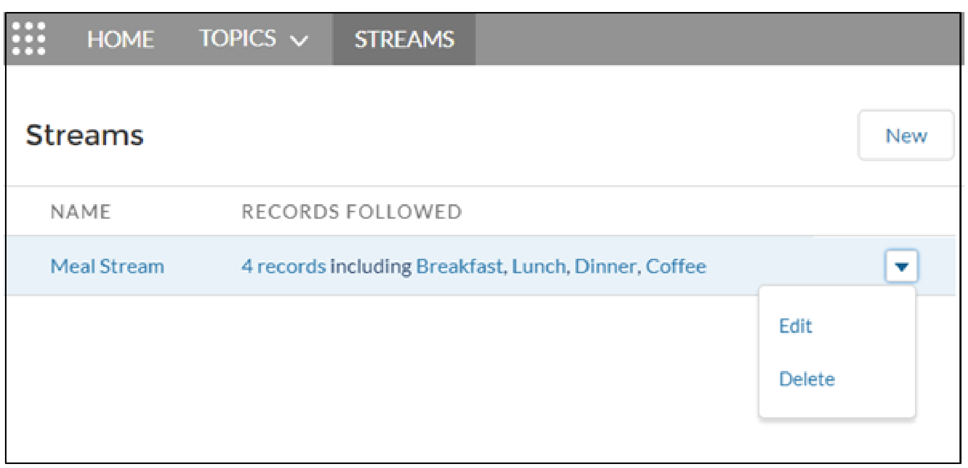
4. In the same field, enter the name of a feed you want to add.
5. In your search results, click the feed you want to add.
   Selected feeds appear below the **Records to Follow** field.



6. Under **Notify Me**, select a notification option.

   To receive an email notification whenever a new post appears in the stream, select **Every Post**. To turn off notifications for this stream, select **Never**. You can change this selection later in a stream's detail view.

7. Click **Save**.
   Your new stream appears in a row on the Streams page. The row lists the number of feeds (records) that are included in the stream and the names of added feeds. Stream actions appear on the row actions menu at the end of the row. To open a stream, click its name.



Delete a Chatter Stream in an Experience Builder Site

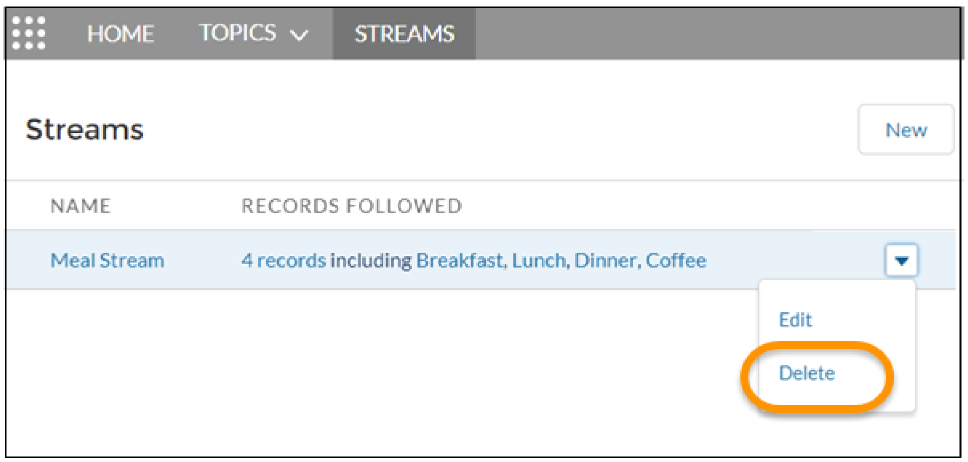
When a stream has lived out its useful life, you can easily delete it from your list of streams in an Experience Builder site. Deleting a stream doesn't delete the records or posts it contains. It deletes only the stream, which frees up space for you to create more streams.

EDITIONS

Available in: Experience Builder sites

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

1. Open the Streams page, and, from the row actions menu on the stream you want to remove, select **Delete**.



2. In the confirmation dialog, click **Delete**.

Edit a Stream in an Experience Builder Site

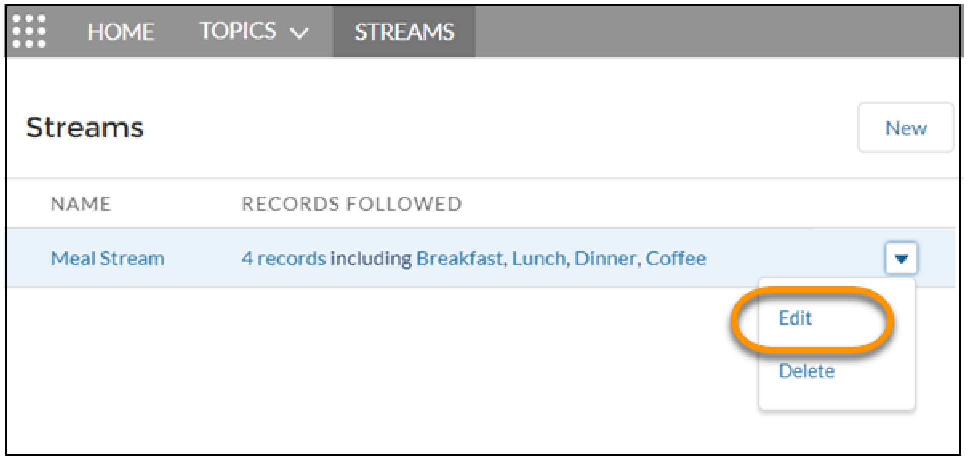
Edit a stream to add feeds to it or remove feeds from it in an Experience Cloud site. You can also change the stream's name and its notifications setting.

EDITIONS

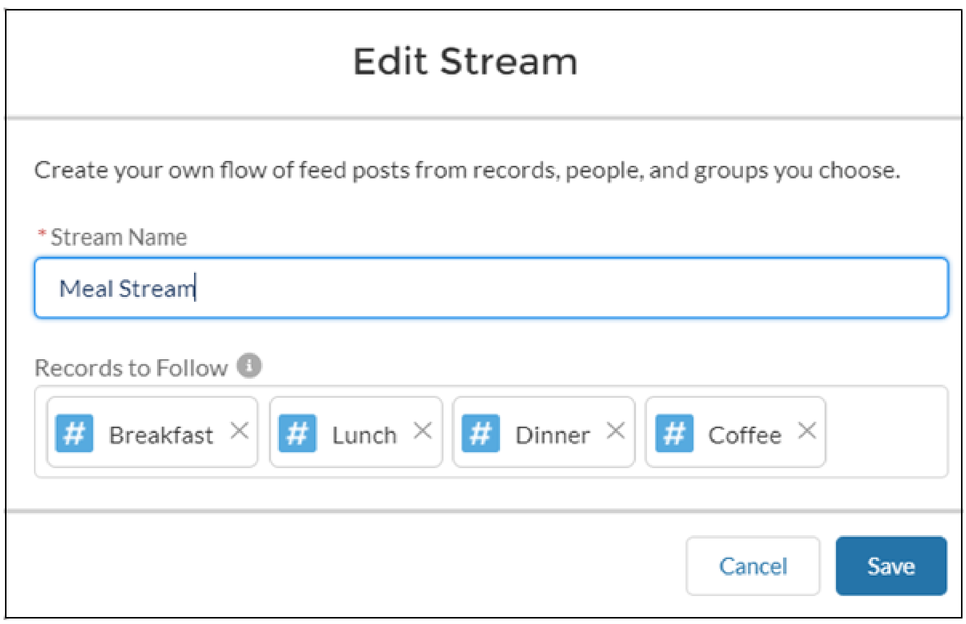
Available in: Experience Builder sites

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

1. Open the Streams page, and, from the row actions menu on the stream you want to change, select **Edit**.



2. In the Edit Stream dialog, change the values you want to change. For example, rename the stream, delete a stream feed (record), add more feeds of a different type or the same type.



When you delete a record from a stream, the stream retains the posts from the deleted feed up to the point of deletion. Deleting a record stops the flow of new information from that feed into the stream.

Note: Knowledge articles (KAs) aren't fully supported in streams. You can add them when you create and edit a stream by searching for the article's ID number rather than its title. But you can't add a KA to a stream from its Follow button like you can with other record types. Articles added to Streams using the article's ID don't appear in Records to Follow on the Stream's edit page. KAs also don't appear when viewing the Follow button details on the article's detail page.

3. Click **Save**.

View Experience Builder Site Streams from Your Internal Salesforce Org

EDITIONS

Available in: Experience Builder sites

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Site members who have access to their internal Salesforce org can view their site streams from the org. When you click most site-based links from the internal org view, they lead right back to the site.

You can take many feed actions, like answer, comment, mention, and like, when you visit a site stream in your internal org. Here are some others.

- Upvote and downvote questions and answers, and see the impact in your site.
- Verify answers, and see the verification in your site.
- Click a link to a user profile, account, topic, or case, and jump to its home site.
- Add a topic, and it's added to your site.
- Click the timestamp on a post, and jump to the post detail view in its home site.
- Copy a link that leads to the item, person, or post detail view in its home site.
- Click a mention in a site stream, and go to its home site.

There's no special setup to get links working between your site and your internal org. However, features, such as upvote and downvote and mark as company verified, do require that you enable them for your site.

Note:

- You can't create a site stream from your internal Salesforce org. Create streams from your site.
- Some Chatter features that are available in a site aren't available when you visit a site stream from your internal org. For example, file attachments, inline images, post sharing, and hover cards aren't available when you view site streams internally.
- Site topics don't appear when you view a stream from your internal Salesforce org. However, you can add topics.

SEE ALSO:

Enable Upvotes and Downvotes

Assign Permission to Verify Answers for Your Company

Share a Link to the Detail View of a Post

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

The Share feature on a feed post includes a Copy Link option. Use it to grab a link that jumps directly to the detail view of a post. Copying places the link on your clipboard. You can paste the link wherever you like.

Note: You don't get notified when someone shares a link to one of your posts.

1. Go to the post you want to share.
2. Click **Share.**
3. In the dropdown list, select **Copy Link**.
4. In the Copy Link to Thread dialog, click **Copy Link**.

   The link is copied to your clipboard.

5. Paste the link wherever you like, in an email, a message, or to a post on another feed.
   When you click the link, it jumps to the detail view of the post. In detail view, you can see the post, its attachments, and its comments.

Experience Cloud Resources

In addition to online help, Salesforce creates guides and tip sheets to help you learn about our features and successfully administer Salesforce.

	For End Users	For Admins
Guides and Tip Sheets		
Set Up and Manage Experience Cloud Sites		✔
Community Management Guide for Experience Cloud		✔

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