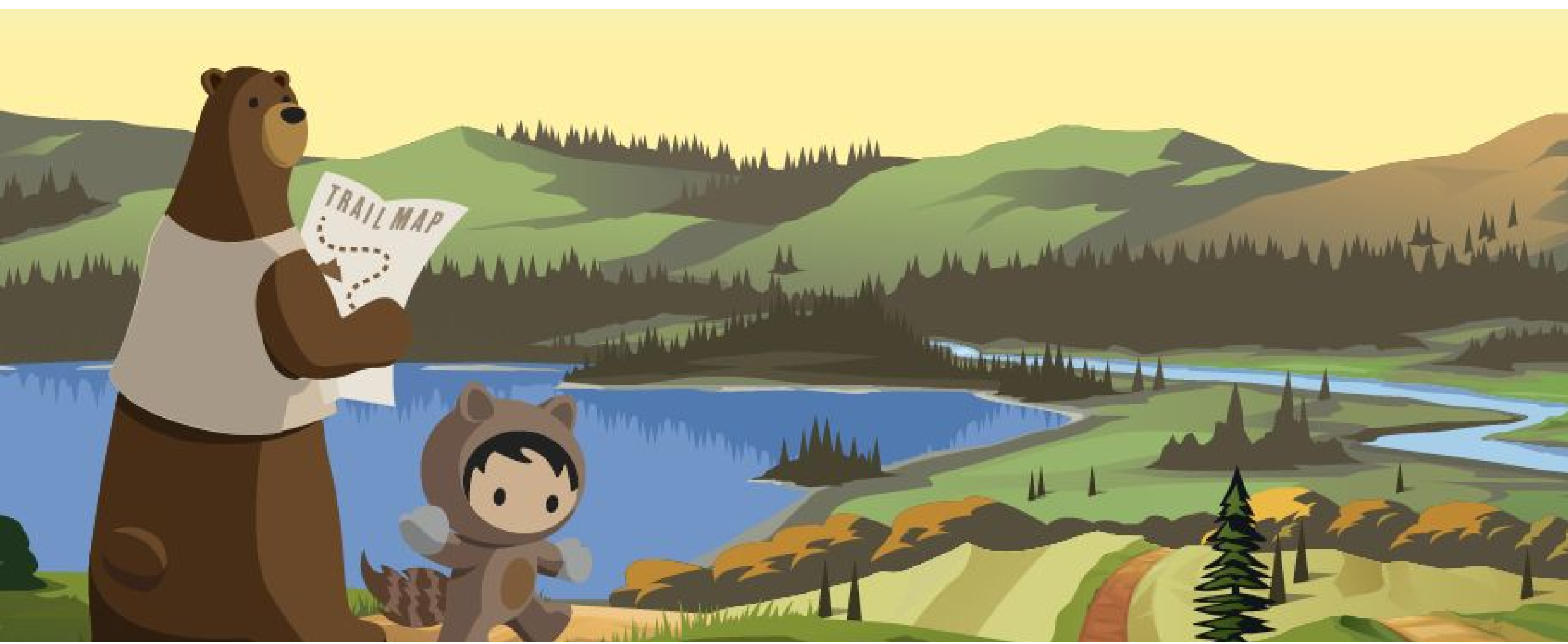
Hands-On Admin Workshop

Introduction to Salesforce Digital Experience Platform

Spring ‘20 Release



Overview

Introduction & Setup

Welcome to the Hands-on Admin Workshop on the Salesforce Digital Experience Platform ! This guide will walk through all the modules covered in the guided classroom setting, and will be valuable as a take-home activity for quick reference on administrative tasks.

The modules included in this guide will utilize the Salesforce platform (App Cloud) to build a **gym's web and mobile experience**. Administrators will work in Digital Experience Platform, Salesforce CRM, and Salesforce CMS to create an immersive experience for end users.

Prerequisites

Some prior knowledge of Salesforce is beneficial, however, this is designed for beginners. This workshop focuses on customer service use cases.

To do this workshop, all you need is a modern browser and an Internet connection.

Each student should have their own computer (a tablet may not work for all sections)
An iPhone or Android phone is desirable, but not necessary.

Browser Requirements

The following browsers are supported when working in the lightning experience (all at current version):

- Google Chrome (preferred)
- Mozilla Firefox
- Apple Safari
- Microsoft Edge
- Microsoft Internet Explorer (minimum version 11)

Module Order

This workshop guide is written to be completed in sequential order. Skipping modules may prevent completion if parts of the data model or logic are not completed.

Module A: Create your free Developer Account

This module will guide you through creating a Developer Edition account, and setting it up before building your application. Developer Edition instances are full-feature Salesforce environments that allow administrators and developers a playground to learn new skills, test their ideas, and develop in isolation from their main Salesforce environment.

PLEASE! DO NOT use your company's Salesforce environment for this workshop

In addition to this workshop, you can use your Developer Edition account to access Trailhead, Salesforce's interactive and hands-on learning management website. Check out all the great things you can learn at https://trailhead.salesforce.com/. If you already have a Trailhead account, you can associate this new developer account to continue to accumulate badges.

Activity 1: Sign up for a new "Dev Org"

Open a browser and navigate to http://developer.salesforce.com/signup

Fill in the form provided:

- Enter your **first name** and **last name**
- Use an **email** address that you have access to during this workshop
- Create a **username**
  IMPORTANT: This username needs to be in the format of an email, but must be unique.
  For this workshop, consider using this format: **firstname.lastname@workshop.dxp**
- Check the box that you accept the Master Services Agreement

Check your email – you will receive an email from Salesforce asking you to verify your account Upon verifying from the email link, you will be asked to create a password for this account. Once complete you should land on the setup page of Salesforce

Write down your username and password for this workshop:

Username: ________________________________

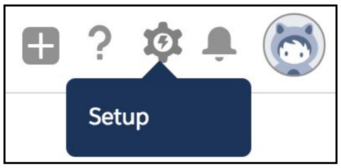
Password (optional): ________________________

Congratulations! You have now created a Salesforce Developer Edition account! You will hear this referred to as an "org", "instance", and "environment", all meaning the same thing – your personal Salesforce playground! You will have access to this whenever you need, so long as there has been activity in the last six months. More information can be found at https://developer.salesforce.com/page/Developer_Edition.

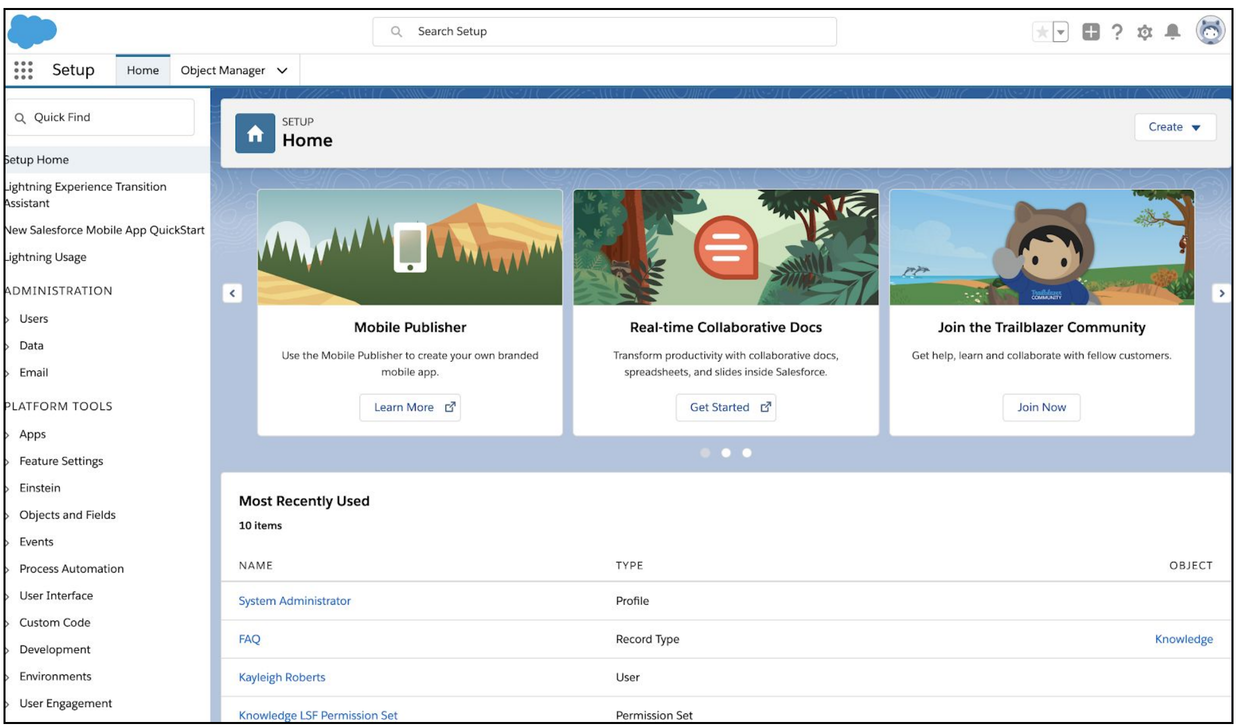
Activity 2: Setting Your Domain

The first activity that you will do in your new Salesforce Developer Org is set up a custom domain. With the Lightning Experience, Salesforce works best when given its own nickname.

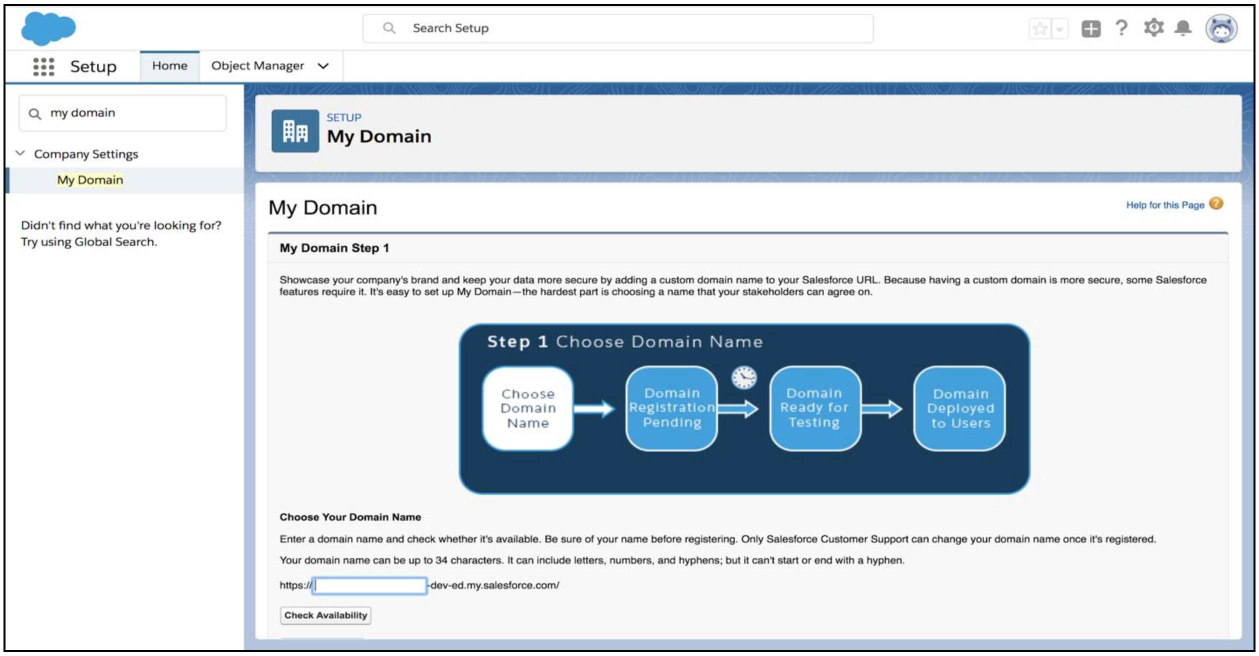
📌**Tip:** You can find the Setup screen by ‘cog’ icon in the upper right corner at any time



1. Let’s begin from the Setup screen:



2. In the Quick Find search bar (found at the top of the left navigation menu) start searching for **My Domain** and select the menu link:



3. For this workshop, use the format **firstname-lastname-dxp-hoaw**. Check that your domain name is available, and then click *Register Domain*

The domain will take a few minutes to register. In the meantime, check out these resources:

- Trailhead – https://trailhead.salesforce.com
- Salesforce Admin Community – https://admin.salesforce.com
- Salesforce User Groups – https://success.salesforce.com/featuredGroups

4. Refresh your browser and the domain setup will be in Step 3. Click on the *Log In* button (Note: if it asks to register your Mobile Number, click I *Don't Want to Register My Phone*)

5. Now that your screen has refreshed, you will notice your URL in your browser shows the domain you have created. Look on the page for the button *Deploy to Users*, and click it

6. Finally, click on the *Setup* button at the top of the page, and this will return you to the screen you started on.

Activity 3: Download Reference Files

Throughout this workshop, we'll use a variety of images, text files, and spreadsheets rather than creating every piece of content from scratch. This will help us save time, and make sure all participants have similar results.

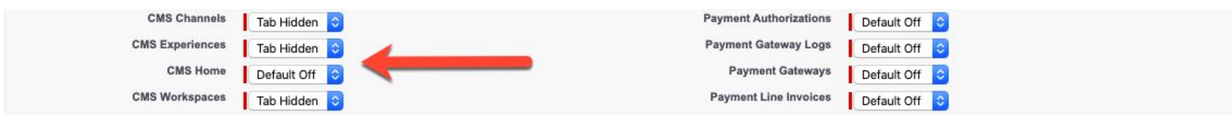
1. In your browser, go to: **https://github.com/SalesforceCA/DXPWorkshop.**
2. Click Clone or **Download** and click Download ZIP **(DXPWorkshop-Master.zip)**
3. After downloading the zip file, make sure the zip file has been unzipped to an easily accessible location on your computer (e.g. your Desktop)

Activity 4: Enable Features and Adjust User Profiles

Salesforce Developer Edition accounts come as full featured instances, however, you have to enable some features before they are available for use.

1. In the Quick Find search bar, start searching for **Communities Settings** and select the menu link.
2. Check the checkbox to **Enable Communities**.
3. For this workshop, use the format **firstname-lastname-dxp-hoaw**. Check that your domain name is available, and then click to register the domain.
4. Check the checkbox to *Reassign new records created by guest users to the default owner*. Click **Save**.
5. In the Quick Find search bar, start searching for **Survey Settings** and select the menu link.
6. Click the toggle to enable Surveys.
7. In the Quick Find search bar, start searching for **Users** and select the menu link. In the table you will find a user with **your name** (do not click on it). Under the column Profile, select **System Administrator** to open the user security profile.
8. Click **Edit** at the top of the page. Under the section Customer App Settings, check the checkbox for **Salesforce CMS.**

Under Tab Settings, update the values to Default On for **CMS Channels, CMS Experiences, CMS Home,** and **CMS Workspaces**.



Click **Save** at the top of the page.

Module B: Community Cloud

Activity 5: Creating a Community

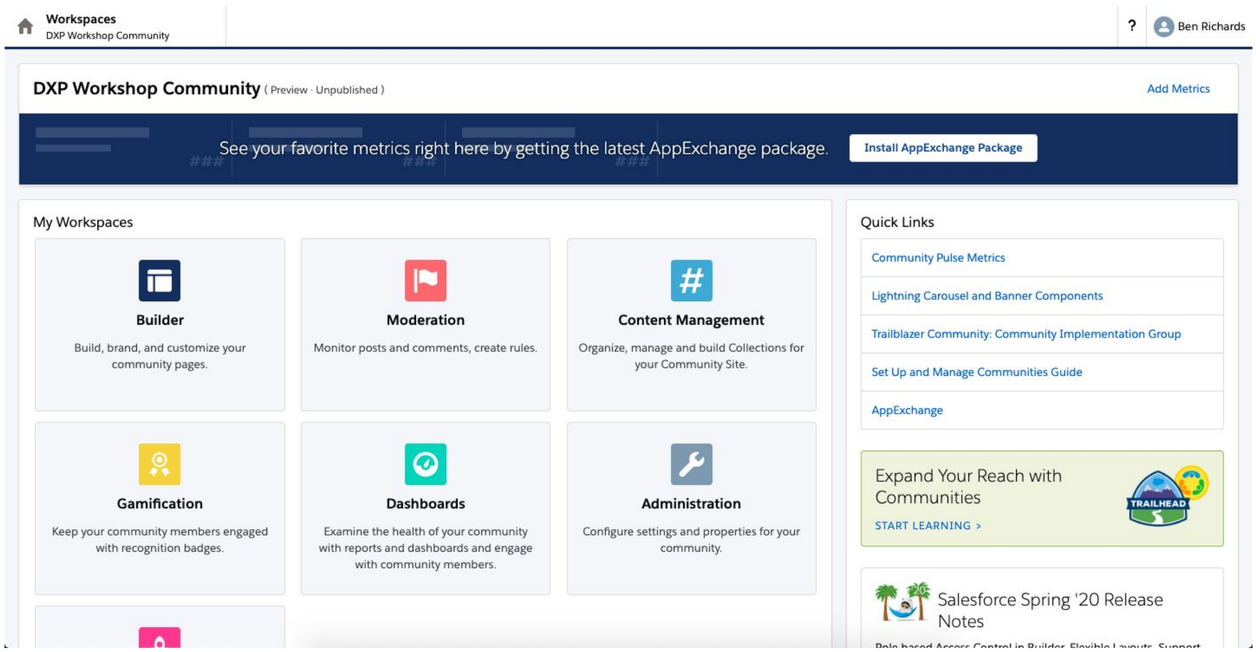
Now that you have prepared your Salesforce org, you will start creating your first community. You can have up to 100 communities in an org, all with different URLs.

1. In the Quick Find, start searching for **All Communities** and select the menu link. Click on the **New Community** button.

2. Follow the wizard to build out the base of your community with one of Salesforce's pre-built templates. Select the **Customer Service** template and click **Get Started**.

3. Give your community a name, such as **DXP Workshop Community**. You do not need to provide a URL to continue. Click **Create** when ready.

4. Once created, you will land on the Community Workspaces menu. From here you can build, populate, and manage all aspects of your community.



Experience Builder: Communities' clicks-not-code builder toolkit that will allow you to design overall themes and layouts, menus and navigation, and pages and record layouts.

Moderation: Define rules and review content generated by users of the community.
Content Management: Select the CMS and CRM content that is available in this community, create topics to manage knowledge and discussions, and define audiences and recommendations to personalize the community experience.

Gamification: Enable community recognition for users' content contributions to showcase knowledgeable users, frequent collaborators, and popular content.

Dashboards: Measure the usage and impact of your community by creating your own dashboards, or leveraging the pre-built dashboards from the AppExchange

Administration: Define the settings that govern community membership, preferences, and communication.

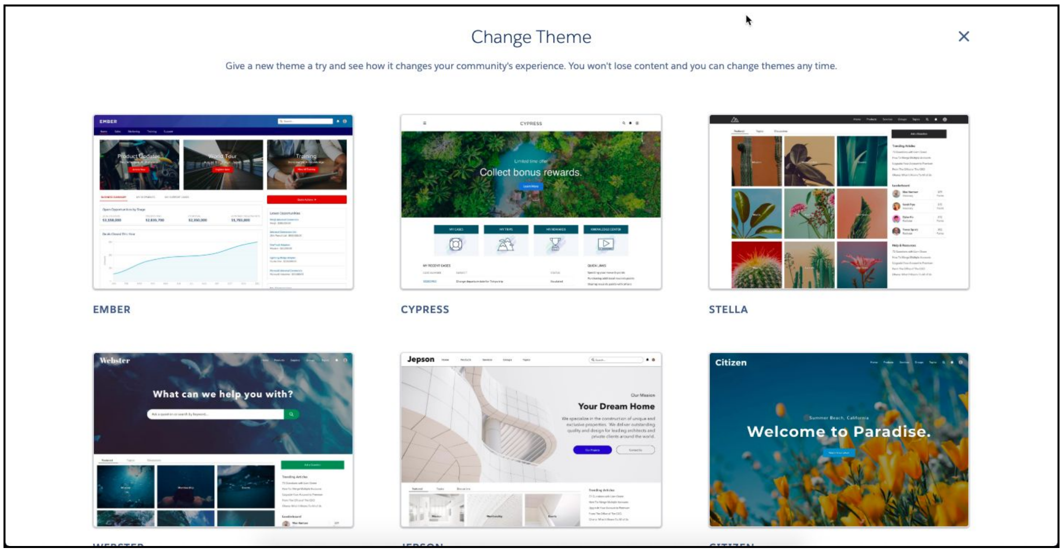
Guided Setup: Salesforce has provided a number of setup wizards for key sales-related items in the community. This is primarily available for the Partner Relationship Management module of Salesforce.

Activity 6: Community Themes & Branding

1. Click on the **Builder** workspace tile to open Experience Builder.

2. On the left hand side of the screen there are four menu items; Components, Themes, Page Structure, Settings. Click on **Theme** (paintbrush icon), then click **Change Theme**

3. Select **Webster**, then click **Activate Theme**



With our new Webster Theme activated, we can now adapt the provided structure with our own images, colours, and branding elements to personalize it for Astro's Gym.

1. Click on the **Theme** (paintbrush icon), then **Images**

2. Click the box under Company Logo (currently a white Webster logo) to change it. **Upload "astros-gym.png"** from the GitHub files we downloaded earlier.

3. Click the back arrow beside Images to navigate back to the initial Theme menu. Now click on **Fonts**. Adjust as follows:
   - Primary Font - **Salesforce Sans**
   - Header Fonts - ***Lobster***
   - Case Text - **Unformatted**

4. Click the back arrow beside Images to navigate back to the initial Theme menu. Now click on **Color**. Adjust as follows:
   - **Action Colour** is **#13532e (dark green)**

- **Link Colour** is **#3b872d (lighter green)**

5. Now we can adjust the header. From the top of the page, click on the Compact Header page component. In the resulting Compact Header settings menu (on the right), adjust as follows:
    - Under the Layout subsection:
        - Adjust **Logo Width** to 250 px
        - Check **Show Search** to TRUE

6. Now click the **Hero** page component. This is the large image at the top of the page.In the resulting Hero settings menu (on the right), adjust as follows:

    - Under the Hero Type subsection **-** Change Type to **Call To Action**

    - Under the Background subsection
        - **Upload "treadmill-photo.jpg"** from GitHub folder we downloaded earlier
        - Below, click on **Image Overlay Colour** and adjust transparency to 60%

    - Under the Content subsection:
        - Update **Title Text** to "Start your trailblazing lifestyle today!"

    - Under the Primary Button subsection:
        - Update **Button Text** to "Sign Me Up!"
        - Leave the Button Link URL blank for now
        - Set **border radius** to 15 px

    - Under the Secondary Button subsection:
        - Update Button Text to "See Success Stories"
        - Leave the Button Link URL blank for now

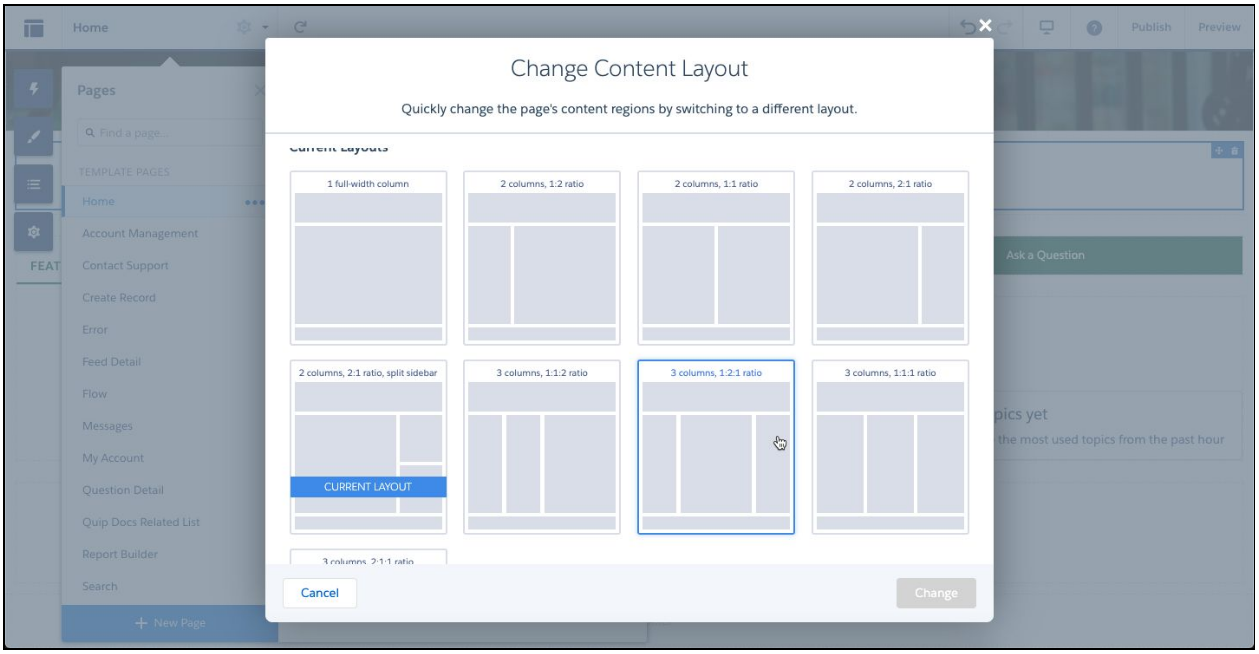
7. We're done setting up our theme and branding, for now. Let's click **Publish** (top right corner) to confirm our changes. To preview, click **Preview**; then click **Back to Builder.** Way to go!

Activity 7: Customize Community Home Page

The Webster Theme by default has included some Components to the Home Page. As you hover your mouse over the elements on the page, you'll notice that each Component is highlighted by a blue outline. By clicking on a Component, you can see additional settings (menu appears on the right side) to modify that individual Component. In this Activity, we'll adjust the layout and components.

The default Home Page has a layout of two columns in a 2:1 ratio, but this can be changed to suit your own style. Let's give that a whirl:

1. From the top menu, click the **gear icon** beside Home for **Page Properties**
2. Scroll to the bottom of the Page Properties to the **Layout** subsection, and click **Change**
3. Select **3 columns, 1:2:1 ratio.** Click **Change** to confirm



Now we can adjust the Components for our Home Page at Astro's Gym.

1. Click on the **Page Structure** menu on the left (list icon, below Theme), to see all Components that have already been added to your Page and their corresponding sections. We want to remove all default Components, so click the garbage can icon beside everything to clear the page.

2. Next, click the **Components** menu on the left (**lightning bolt icon**)

   These are all out-of-the-box Components that can be used right away. You could also *get more on the AppExchange* using the button at the bottom (but we're not going to do that right now).

3. Select the **Tile Menu** component, and drag to the **Content Header** (full width top section) of the page - just below the Hero image.
   a. We will need to create a menu to show content in this new Tile Menu Component, so let's go to the **Settings** menu on the left (cog icon), then to the **Navigation** subsection.

b. Click on **Add Navigation Menu**
c. **Menu Name** is “Home Page Tile Menu”
d. Click **Add New Menu Item** button
    - **Name** is “Group Fitness”
    - Set the **Type** to Community Page
    - Set the **Page** to “Error”*(just for now. We can change this later.)*
    - Check box for **Publicly available** to TRUE
    - Under **Optional** - Upload an image for the tile: “group-classes.jpg” from the GitHub downloaded folder

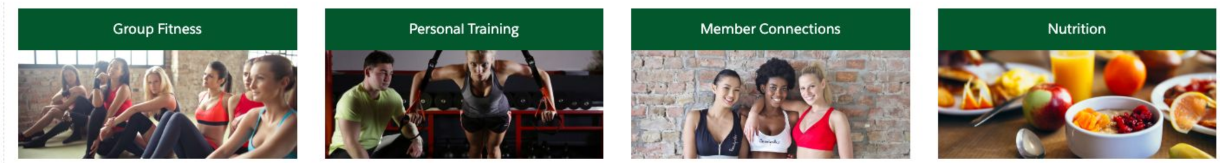
e. Let’s add another one - Click **Add New Menu Item** button
    - **Name** is “Personal Training”
    - Set the **Type** to Community Page
    - Set the **Page** to “Error”*(just for now. We can change this later.)*
    - Check box for **Publicly available** to TRUE
    - Under **Optional** - Upload an image for the tile: “personal-training.jpg” from the GitHub downloaded folder

f. Let’s add another one - Click **Add New Menu Item** button
    - **Name** is “Member Connections”
    - Set the **Type** to Community Page
    - Set the **Page** to “Error”*(just for now. We can change this later.)*
    - Check box for **Publicly available** to TRUE
    - Under **Optional** - Upload an image for the tile: “member-connect.jpg” from the GitHub downloaded folder

g. Let’s add one final menu option - Click **Add New Menu Item** button
    - **Name** is “Nutrition”
    - Set the **Type** to Community Page
    - Set the **Page** to “Error”*(just for now. We can change this later.)*
    - Check box for **Publicly available** to TRUE
    - Under **Optional** - Upload an image for the tile: “nutrition.jpg” from the GitHub downloaded folder

h. Click **Save Menu** button to finish your Tile Menu

i. Click on your Tile Menu component, and in the component settings, change the Default Menu to **Home Page Tile Menu**.



4. From the **Components** menu (lightning bolt icon), select **Rich Content Editor** and drag onto the **Template Footer** section (bottom-most section of the page).
    a. Double click on the Rich Content Editor component that you just added. You will see a rich text editor toolbar appear.
    b. Type - “Copyright 2020 by Astro’s Gym”
    c. Centre the text
    d. Update style to Heading 3

5. From the Components menu (lightning bolt icon), select **CMS Single Item** and drag onto the **sidebar** section (left-most section of the page). Because you have yet to create content, you’ll notice an error message. No worries! We’ll fill this in later.

6. From the Components menu (lightning bolt icon), select **Featured Topics & Feeds** and drag onto the **content** section (middle section of the page).

7. From the Components menu (lightning bolt icon), select **Create Record Button** and drag onto the **sidebar alt** section (right-most section of the page).
    a. **Button Label** is “Refer a Friend”
    b. Set the **Global Action** to New Lead

8. From the Components menu (lightning bolt icon), select **Recommendations Carousel** and drag onto the **sidebar alt** section (right-most section of the page), below the “Refer a Friend” button you’ve just created.
    a. **Title** is Recommended Reading
    b. **Recommendation Channel** is Default Channel

9. From the Components menu (lightning bolt icon), select **Contact Support Button** and drag onto the **sidebar alt** section (right-most section of the page).
    a. **Button Label** is “Ask For Assistance”

10. From the Components menu (lightning bolt icon), select **CMS Collection** and drag onto the **content footer** section (bottom section of the page, above the footer text we created earlier). Because you have yet to create content, you’ll notice an error message. No worries! We’ll fill this in later.

The home page for Astro’s Gym is now complete! Yipee!

Using standard Components in the Experience Builder makes it fast and easy to tailor a beautiful and mobile-responsive page.

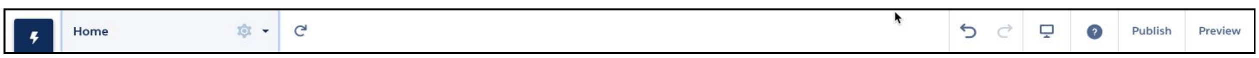
Let’s click **Publish** (top right corner) to confirm our changes. To preview, click **Preview** - you can even switch to a mobile view. Then click **Back to Builder** to continue to the next Activity.

Activity 8: Create a Custom Community Page

The Experience Builder ties into existing Salesforce objects and a range of standard pages, however, you can also make your own unique Pages to showcase even more content that is entirely unique to your needs.

Let’s set up a basic landing page for Group Fitness details, letting our prospective gym members know more about our programs. Let’s get started!

1. From the Experience Builder, click on your **Pages** menu at the top (it should say “Home” by default):



2. At the bottom, click **New Page**
3. Select **Standard Page**
4. Select **Flexible Layout** and click **Next**
    - **Page Name** is “Group Fitness”
    - Click **Create**

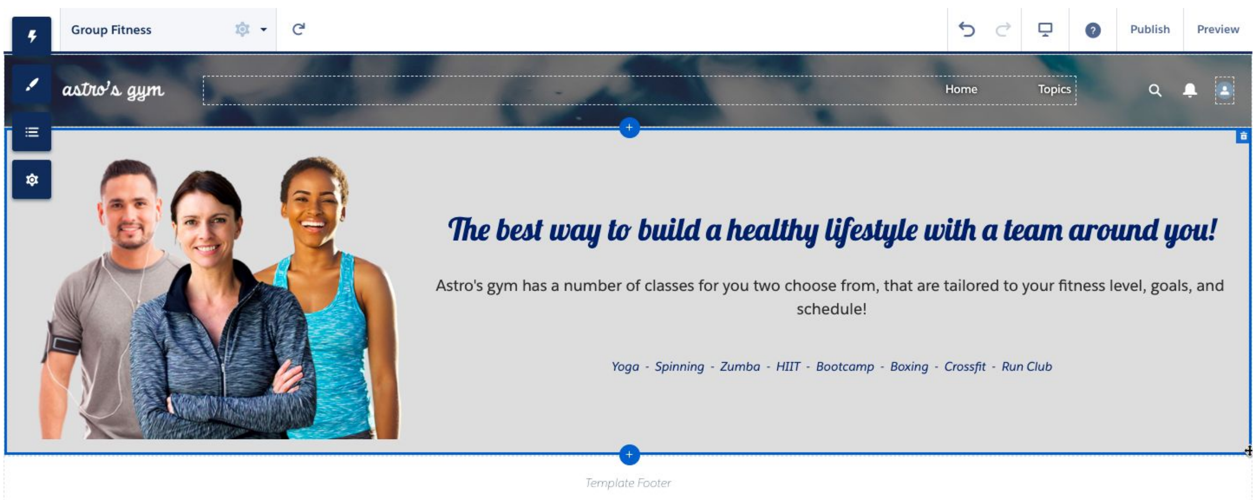
5. For **Section 1**:
    - **Column Layout** is 2 (two)
    - **Column Distribution** is 4:8 (drag the slider)
    - Section Style:
        - **Color** is #DDDDDD (grey)
        - **Image Overlay Color** - Transparency to 0

6. Now, in **Column 1**, add a **Rich Content Editor Component** (drag-and-drop onto page). Double-click the component to edit the contents. Click the **image icon** in the rich text editor toolbar and upload “sport-people.jpg” from the GitHub folder

7. Next, in **Column 2**, add a Rich Content Editor Component (drag-and-drop onto page). Open the “ group-fitness-header.txt” file from the GitHub folder and copy/paste into this Rich Content Editor section (double-click the component to edit the contents) and update:
    - Style to Heading 1
    - Font size 36

- Colour is navy

8. Add another Rich Content Editor Component below the one you just finished. Open the “group-fitness-subheader.txt” file from the GitHub folder and copy/paste into this Rich Content Editor section (double-click the component to edit the contents) and update:
    - Font size is 18
9. Add another Rich Content Editor Component below the one you just finished. Open the “ group-fitness-activities.txt” file from the GitHub folder ,and copy/paste into this Rich Content Editor section (double-click the component to edit the contents) and update:
    - Centre align the font
    - Italics
    - Font size is 18
    - Colour is navy



We’re going to add another section to the page.

1. To add another section, click the “+” at the bottom of the grey area in Section 1. (Don’t adjust anything further - we just want a single column for this one)

2. Add a **Tabs Component** (drag-and-drop onto page in Section 2).
    a. Click on **Tab 1**. Rename to “Spinning” and click **Save**.
    b. Click on **Tab 2**. Rename to “Yoga” and click **Save**.
    c. Click on **Tab 3**. Rename to “Crossfit” and click **Save**.

3. Click on the **Spinning Tab**. Drag-and-drop a **CMS Collection Component** here.

4. Click on the **Yoga Tab**. Drag-and-drop a **CMS Collection Component** here.

5. Click on the **Crossfit Tab**. Drag-and-drop a **CMS Collection Component** here.

6. To finish this Page, click on the Settings Menu (cog icon on the left).
    a. Click on **Navigation**.
    b. Beside the **Home Page Tile Menu**, click the show more button on the right (d**ownward arrow**) and click **Edit**.
    c. On the Group Fitness menu item, update the Page from “Error” to “Group Fitness”
    d. Click Save

Let’s click **Publish** (top right corner) to confirm our changes. If you wish, click **Preview**. Then click **Back to Builder** to continue to the next Activity.

By now, you’re really getting the hang of it. Whether you’re modifying a standard page (like our Home Page), or building a brand new Custom Page (like this group fitness info page), using Components creatively helps you design your digital experiences at lightning speed.

Activity 9: Community Security

Public Access - Guest User

1. From the Experience Builder, click on the **Settings** menu (cog icon on the left).

    a. Click on **General**

    b. **Public Access** - Check the box for *Public can access the community* to TRUE

    c. **Guest User Profile** - Click on the **link of the Profile name,** which is “DXP Workshop Community Profile” in our example. This will open a new tab in your browser with the related Profile details.
        - Click **Edit**
        - Under **General User Permissions** section, check the checkbox for **Run Flows**.
        - Under **Standard Object Permissions** section, set the following:
            - **Cases** - Read & Create
            - **Documents** - Read
            - **Leads** - Read & Create
            - **Surveys** - Read
            - **Survey Invitations** - Read
            - **Survey Responses** - Read & Create
        - Click **Save** and close the browser tab.

2. Finally, publish these changes to your Community by clicking the **Publish** button in the upper right corner.

Authenticated Access - Community User

Some sections of the Community should only be visible to gym members. Astro's Gym wants to provide more personalized digital experiences based on who has logged in, for example: a customer should be able to see their own Cases. We can accomplish this by creating authenticated access with Community Users *(Note: This requires additional licensing from Salesforce. Ask your Account Executive for more information.)*

Let's build this out:

1. Under the main Experience Build menu (top left corner), go to **Administration**

2. Click the **Members** tab
    - Under **Select Profiles**, beside search, use the drop-down to select "Customer"
    - Select the **Customer Community User Profile** from the list, and click **Add**
    - Click **Save**

Now, when Salesforce Contacts are enabled as Community Users (i.e. provisioned a license), they will be emailed with a link to access the Community.

3. Next, click on **Login & Registration** tab

4. Upload a new Logo File - Use "login-logo.png" from the GitHub download folder

5. At the bottom of the page, in the **Registration Page Configuration** section, check the box for *Allow external users to self-register* to TRUE
    - Assign users to the Profile - Customer Community User

6. Click **Save**

Module C: Knowledge Base

Activity 10: Set up Lightning Knowledge

We know that customer expectations are rising, regardless of your industry. These days, customers expect self-service options in their preferred channels, including online and on their mobile devices.

Astro's Gym wants to provide unparalleled customer experience - whether it's helping a customer find an answer to their questions themselves online, or, if their team is supporting something more complicated. Lightning Knowledge will provide a high-powered way to streamline support documentation to empower customers to help themselves, and to empower agents. It's easy to set up, so let's do it!

Note for real life: To create, modify, or publish a Knowledge Article, your user must have a Knowledge license. This is an extra license for Professional or Enterprise Edition orgs, and is included for Unlimited orgs. Once enabled, other users can *view* Knowledge Articles without purchasing a license. For more detailed information about Salesforce licensing, please speak with your Account Executive.

1. From **Service Setup Home**, click on the **Knowledge Setup** tile within the **Recommended Setup** section. (If it's not shown on your Home screen already, click on View All from the Recommended Setup section to locate it.)

2. Click **Start**

3. Choose your Lightning Knowledge Authors - ensure your username is selected. Click **Next**.

4. Get Organized:
   - **Enter a Data Category Group** - FAQ
   - **Enter a Data Category** - Membership
   - Click **Add Another Data Category** button and add the following:
     - Membership & Billing
     - Fitness
     - Nutrition
     - Facilities
   - Click Next
5. Click **Finish**

Activity 11: Customize Knowledge Articles

Knowledge Articles can have Custom Fields, Record Types, and Page Layouts - similar to other Objects in Salesforce. You can personalize Articles to make them really simple to follow for your customers, and provide more context to empower your internal teams.

At Astro's Gym, they want a section for comments that just the staff can see. This will help agents working the desk handle more complex questions with ease.

1. From Service Setup, click on the **Object Manager Tab**. Click on the **Knowledge** Object.

2. On the left side menu, go to **Fields & Relationships**. Click **New** button, upper right

3. Choose **Text Area (Rich)** as the new field type. Click **Next**

4. Field Label is **Internal Comments**. Click **Next**

5. In Field Level Security, double-check that this new field is not visible to any Customer Community user profiles (this should be the default setting). Click **Next**

6. Add the new Internal Comments field to all Article Type Page Layouts. Click **Save.**

7. On the left menu, select **Page Layouts**, and click on **Lightning Knowledge FAQ Layout**.

8. In the toolbox at the top of the screen, use the Quick Find to search for **Summary.** Drag the tile onto the layout below and place directly below the Title field. Click **Save** in the toolbox at the top. This will return you to the previous screen with the list of page layouts.

9. Click on the **Page Layout Assignment** button in the top right corner, and then click **Edit Assignment**. Shift-click the header of the two columns to highlight everything, and from the Page Layout To Use dropdown menu, select **Lightning Knowledge FAQ Layout**. This will update the entire table. Click **Save** at the top of the page.

Activity 12: Create & Publish a Knowledge Article

Knowledge Articles can be created by any user who is designated as a Knowledge Author. (You can apply this via Permission Set at any time if you missed it in the guided setup wizard we just followed in Activity 5.) This means, we will navigate out of the Service Setup menu and into the Service Console to create and publish Knowledge Articles like any other end user.

1. Click on the **App Launcher** icon, and switch to **Service Console**.

2. Navigate to the **Knowledge Tab** from the primary drop-down navigation menu.

3. Click **New**

4. Fill in the following content:
   - **Title -** Membership Cancellation

   - **Internal Comments** (click Edit) **-** “Cancellation is effective based on next monthly membership payment date.” (Try changing the colour using Rich Text Editor)

- **Summary** (click Edit) - How do I cancel my membership?

- **Question** (click Edit) - How do I cancel my membership?

- **Answer** (click Edit) - Cancel anytime by letting us know in writing via email, or through the Astro's Gym Community by logging a Membership Case.

- Review the Article Properties:
  - Check **Visible to Customer** = True
  - Check **Visible In Public Knowledge Base** = True

- Click **Save**

- On the right side of the Article, update **Data Categories** by clicking the down arrow, click **Edit**. Expand the Data Category Group “FAQ” to see the other Data Categories. Select “Membership & Billing”.

5. In the upper right corner, click the **Publish** button
   - Select **Publish Now** (default) and click **Publish** to complete

Activity 13: Import Knowledge Articles

Astro’s Gym already had a FAQ document written for their staff training manual, so they’ve provided you with several more Knowledge Articles they would like to be available to their internal team - and some to customers directly online. They’ve already formatted this content in a spreadsheet (.csv) file, so we can easily import these articles all at once.

Now, we can import the Knowledge Articles:

1. From the Quick Find search in Service Setup, navigate to **Import Articles**

2. Steps 1-3 provide helpful guidance to remind you how to structure your import, but Astro’s Gym has already taken care of that for us and the CSV file is ready to use. Go to Step 4:
   - **Knowledge Base** - Select Knowledge
   - Zip File - Click **Choose File** and select the **“kb-import.zip**” from the folder that was previously downloaded from GitHub

3. Once your Articles finish uploading, we still need to publish them and make them visible to our team and through the Community.
   - Use the **App Launcher** to switch to the **Service Console** and navigate to the **Knowledge** tab.
   - Change the **List View** to Draft Articles
   - Use the checkbox at the top of the list to **select all** Draft Articles

- Click **Publish** button (upper right)

Activity 14: Setup Knowledge in Communities

For our Knowledge Articles to be easily browsed and to optimize search in the Community, we need to enable Topics for Knowledge Object. For now, we need to switch to the Setup menu in Salesforce Classic to complete the following steps:

4. Click on **View Profile** (your user icon in the top right corner, image of Astro by default)
5. Under Options, click on **Switch to Salesforce Classic**
6. Click on **Setup** (top right)
7. In the Quick Find search (at the top of the left navigation menu) and navigate to **Topics for Objects**
8. Click on **Knowledge** from the list of Objects
9. Click on the **Enable Topics checkbox** at the top. Click **Save**
10. Switch back to Lightning Experience by clicking **Switch Back to Lightning Experience** at the top of the page

Now that Topics are enabled for the Knowledge Object, we can finish the setup in the Community.

1. From Setup or Service Setup, use the Quick Find to start typing **All Communities** and click the menu link. Click on **Workspaces** for the DXP Workshop Community.

2. Click on the tile for **Content Management**, and select the tab for **Topics**.
    a. Click the **New** button at the top of the page and enter the following information:
        i. Topic Name **- Membership & Billing**
        ii. Description **- Frequently Asked Questions for Membership & Billing**
        iii. Enabled for Content is **checked**
    b. Click the **New** button at the top of the page and enter the following information:
        i. Topic Name - **Facilities**
        ii. **Description - Frequently Asked Questions for Gym Facilities and Maintenance**
        iii. Enabled for Content is **checked**
    c. Click the **New** button at the top of the page and enter the following information:
        i. Topic Name - **Nutrition**
        ii. Description - **Frequently Asked Questions for Nutrition, Diet, Preparation, and Recovery**
        iii. Enabled for Content is **checked**
    d. Click the **New** button at the top of the page and enter the following information:
        i. **Topic Name - Fitness**

        ii. **Description - Frequently Asked Questions for Fitness Programs, Routines, and Classes**
        iii. Enabled for Content is **checked**

3. On the left menu bar, select **Automatic Topic Assignment**. This tells the system how to assign Topics to existing articles and any new article that is created based on the data category assigned.

4. Click the toggle to Enable **Automate Topic Assignment**.
    a. Select the Data Category Group **FAQ** from the first list. Add a Topic **Frequently Asked Questions**. Check the checkbox for **Add above topic(s) to all existing articles in the data category**. Click **Save**.
    b. Select the Data Category **Facilities** from the second list. Add the Topic **Facilities**. Check the checkbox for **Add above topic(s) to all existing articles in the data category**. Click **Save**.
    c. Select the Data Category **Membership & Billing** from the second list. Add the Topic **Membership & Billing**. Check the checkbox for **Add above topic(s) to all existing articles in the data category**. Click **Save**.
    d. Select the Data Category **Fitness** from the second list. Add the Topic **Fitness**. Check the checkbox for **Add above topic(s) to all existing articles in the data category**. Click **Save**.
    e. Select the Data Category **Nutrition** from the second list. Add the Topic **Nutrition**. Check the checkbox for **Add above topic(s) to all existing articles in the data category**. Click **Save**.

5. On the left menu bar, select Featured Topics
    a. Select **Fitness** and click the **Add button**.
        i. Click the pencil and upload image “**fitness-thumb.jpg**”
    b. Select **Nutrition** and click the **Add** button.
        i. Click the pencil and upload image “**nutrition-thumb.jpg**”
    c. Select **Facilities** and click the **Add** button.
        i. Click the pencil and upload image “**facilities-thumb.jpg**”
    d. Click **Save**.

6. On the left menu bar select Navigational Topics
    a. Enter **Membership & Billing** and click the **Add** button.
    b. Click on the icon the **book icon** and select the Data Category **All > Membership & Billing**. Click **Add Articles & Close Window**. Click **Save** to update.

7. On the top menu, click the Tab **Recommendations**. This allows you to build recommendation sets for different audiences in the community.
    a. Ensure the Recommendation Channel is set to **Default Channel** and click **New**.
    b. Enter in the following content:

i. Name: **Yoga Recommendation**
ii. Upload Image: “**yoga.jpg**”
iii. Title: **Tips For Your First Yoga Class**
iv. Description: **How to prepare for your first yoga class at the studio**
v. Button Text: **Read More**
vi. http://: *your domain name* + **/s/article/first-yoga-class**
vii. Audience: **All Communities Members**
viii. Enabled: **checked**

c. Click **Save**.

8. Click on the Content Management menu button in the top left corner and select **Builder**. When the Experience Builder loads, you will notice the Featured Topics component is populated. If you click **Preview**, you can explore topics and see articles published to the community.

That was a few steps to get knowledge setup, but you know have a connected knowledge base and community, where new published content will be available for consumption immediately to users.

Module D: Content Management

Activity 15: Setup Salesforce CMS Workspace

Salesforce introduced its Content Management System to simplify the process of creating, managing, and publishing content both inside Salesforce and across many external applications. This section will guide you through setting up CMS, and adding content to your Community.

1. In Your Workspaces Menu, click on **Content Management**, and the **Content** tab. It should be default be empty with a button for “Go to Salesforce CMS App”. Click on that button.

2. On the CMS Home page, you will see a section for Workspaces and a section for Experiences.

   Workspaces are your internal folders and structure that your team can plan around. Workspaces have permissions and roles, as well as settings for how content can/should be presented.

   Experiences represent your communities that exist in Salesforce. This is another way of accessing communities instead of through the setup menu. Communities aren’t the only way to experience your CMS content, but is the only channel available for configuration in this interface. Marketing Cloud, Commerce Cloud, Heroku, and external apps can all consume CMS content.

3. Click on the button under the Getting Started component **Create a CMS Workspace**.

4. Give your workspace the name **DXP Workshop**. Provide the description **Content for my DXP Workshop Community**. Click **Next**.

5. Click on **Create Channel** at the top of the wizard. This is where you can create external endpoints for other systems. You won't do this today, so click **Cancel**. Click the **+** box for your DXP Workshop Community and click **Next**.

6. If there were other contributors you wish to create content, you could add them here, including Integration Users if content is being created through the API. Today you will just click **Next**.

7. Select **English (United States)** as a language, and assign it to be the default language. Click **Next**.

8. Finally, review your workspace settings and click **Done**.

Now that you have created a Workspace, you can start creating content.

Activity 16: Add CMS Content

Content in Salesforce CMS is built heavily on metadata to help provide experience applications as much information as possible on how to present the content. You can have the same piece of content presented in a variety of different ways, from a new article in a Community, to a content block in a Marketing Cloud Email, even as a voice skill response through Google Home or Amazon Alexa. Metadata drives this variation while keeping content standardized.

You can create custom CMS content types in Salesforce to include all the relevant metadata you require. However, for the DXP workshop, we are keeping the content type pretty standard.

1. Click on **Create Content** from within the Workspace.

2. Give your Content a Title of **Astro Opens New Facility in Local Mall**.

3. For the content Body, copy and paste the text from **astro-gym.txt.**

4. In the body text, change the format of the first line to **Heading 2**.

5. In the body text, after the first paragraph, add in the image **workout.jpg.** Before the last paragraph, add in the image **weight-class.jpg**.

6. Upload the image **city.jpg** as the Banner Image.

7. Copy the header **Dream Astro's Gym Opens in Stunning Location** as the excerpt.

8. Click **Save Draft** at the top of the page.

9. Once the content has saved, click the **Publish** button.

To Complete Our CMS content creation we are going to create three yoga related content records to include on the group fitness page of our community.

1. Return to the Content Workspace and click **Add Content**

2. Create the first content with the following information. **Save** and **Publish** when finished.
    - Title: **Post-Ride Recovery Shake**
    - Body: **spin-blog-1** *(copy and paste from)*
    - Banner Image: **smoothie.jpg**
    - Excerpt: **Nutrition is so important not just before your ride to fuel your workout, but also after your ride to help your body replenish and recover.**

3. Create the second content with the following information. **Save** and **Publish** when finished.
    - Title: **Cross Training with Spinning**
    - Body: **spin-blog-2** *(copy and paste from)*
    - Banner Image: **cross-training.jpg**
    - Excerpt: **The faster you move your legs on the bike, the faster you'll be able to lift your foot from the ground when running.**

4. Create the third content with the following information. **Save** and **Publish** when finished.
    - Title: **Couples Who Sweat Together**
    - Body: **spin-blog-3** *(copy and paste from)*
    - Banner Image: **couples.jpg**
    - Excerpt: **Working out together unites us around a common goal.**

5. Once all four content pieces are published its time to share them out through your experience layer.

Activity 17: Create CMS Collection and Add to Community.

Your CMS content creation is completed and it is time to finish adding content to the community in the placeholders we created earlier.

1. On the CMS Home page, click on **Workspace** beside the DXP Workshop Community under All Experiences.

2. Click on the **Content Management** tile. Under the Content tab, you will see that your four created content records are now available.

3. Click on the **Collections** tab at the top of the screen. Click on **Create Collection**.

4. Provide your collection with the Name **Spinning Blog Posts** and select the source being CMS Content. We will work with Salesforce CRM records here later.

5. Select to **Manually** curate your content. In the future you may consider building rules to auto-curate your content based on the metadata you set on the content.

6. Select the three content records you created last by clicking the **+** button. Click **Finish** when complete.

Your collection can now be referenced directly from the CMS Collection component in a community. Each collection is unique to a community, so you can mix and match without disrupting how another experience may be using the content records.

1. Click on the **Content Management** button in the top left corner of the screen, and switch the **Builder**.

2. On the home page, click on the CMS Single Item Component that you placed in the Left Sidebar location. In the components settings, click **Add Content**. Select the **Astro Opens New Facility** content record.

3. Under **Content Layout,** select the **Tile Layout.** Deselect the checkboxes for **Show Flag, Show Eyebrow, Show Metadata 1, Show Metadata 2,** and **Show Date**.

4. Under **Field Mappings**, set the Headline to map to **TItle**, Subheading to map to **Excerpt**, Image to map to **Banner Image**.

5. Under **Featured Media**, check the checkbox for **Use Aspect Ratio**, and set the ratio to **16:9**.

6. Under **Headline**, set the Heading Tag to **Heading 1.**

7. Under Subheading, set Font Size to **Small**.

8. Under Effects, set the Component Hover Effect to **Image Zoom In**.

You have now configured the CMS Item for your Home page. Next Step is to add the CMS collection to the Group Fitness page.

1. Click on the Page Menu at the top of the page (will say Home by default), and select **Group Fitness**.

2. Under the Spinning tab, click on the CMS Collection component you added to the layout. n the components settings, click **Add Collection**. Select the **Spinning Blog Posts** collection and click **Save**.

3. Under **Collection Layout**, select the **Grid** layout. Set the Item Spacing to **Large**.

4. Under **Content Layout,** select the **Card Layout.** Deselect the checkboxes for **Show Flag, Show Eyebrow, Show Metadata 1, Show Metadata 2,** and **Show Date**.

5. Under **Field Mappings**, set the Headline to map to **TItle**, Sub-Heading to map to **Excerpt**, Image to map to **Banner Image**.

6. Under **Featured Media**, set the Media Height to **215px**. Set the Image Width to **40%**.

7. Under **Headline**, set the Heading Tag to **Heading 1.** Set the Headline 1 Font Color as a Custom Color with the value of **rgb(5, 29, 67)**

8. Under Subheading, set Font Size to **Small**.

9. Under Effects, set the Component Hover Effect to **None**.

The last step is to adjust how the CMS content shows when you click in from the components.

Activity 18: Adjust the News Detail Page

The News Detail page, like the Home Page or the Custom Page you made earlier, is a flexible layout that allows you to decide how the content detail shows up. The unique element is that its dynamic to the record you are looking at. You are effectively setting up the template that is filled in when a record is chosen. This is a principle that also applied to Salesforce CRM data you are presenting in the community.

1. Click on the Page Menu at the top of the page, and select **News Detail**. The News Detail page starts with a flexible layout Section on the page. You could change the columns and ratios, but for this exercise we will use the standard 1-column option.

2. From the Components Menu on the left of the screen, drag the **CMS Single Item (Detail)** component into the main section.

3. Select the **Detail Layout with Sections** layout and deselect the checkboxes for **Show Subheading**, **Show Metadata at Top**, **Show Featured Image**, **Show Featured Video**, and **Show Date**.

4. Under **Field Mappings**, set the Headline to map to **Title**, Sub-Heading to map to **Excerpt**, and Content Body to **Body**.

Now that the component has been configured let's click **Publish** (top right corner) to confirm our changes. If you wish, click **Preview**. Then click **Back to Builder** to continue to the next Activity.

Activity 19: Create CRM Record Collection

When you were building your collection in the past activities, there was an option to turn Salesforce CRM records into content. This is extremely useful if the information you are exposing in the community is data managed through a CRM process. You are going to explore this by creating a collection for Local Events and sharing it on the home page of your community.

Before you can create a collection you will need to create a Custom Object in Salesforce CRM and upload data to it. Luckily you can do this is one quick step.

1. In the Setup menu, click on the tab at the top of the page for **Object Manager**. In the header, under the **Create** button click the option for **Create Object from Spreadsheet**.

2. In the new tab that opens, click **Login to Salesforce**. Enter the credentials you used for your DXP Workshop org.

3. In the first box, click **Upload** and select the Local Events.csv file provided for the workshop.

4. In the Import Table, change the Salesforce Field Type for Description to **Text Area (Long)**. Change the Salesforce Field Type for Type to **Picklist**. When you are

comfortable with the table, click **Next**.

5. Change the Label to **Local Event**, and the Plural Label to **Local Events.** Click **Finish** to create the Custom Object and upload the data in the spreadsheet.

6. Return to the previous tab and refresh the Object Manager screen. Use the search in the header to look for **Local** and confirm that the object has been created.

7. Click on the App Launcher menu search for **Local Events** and open up the Tab. By default it will open the List View for Recently Viewed. You will need to create a new list view to use for your collection.

8. On the header of the Local Events Tab, click on the gear icon and select **New**. Give your new list view the name **All Local Events**. Select the radio button for **All users can see this list view**. Click **Save**.

9. Click on the gear icon again, and select **Select Fields to Display**. Remove Local Event from the Visible Fields, and add **Name, Description, Image URL, Event Date, Type,** and **Location.** Click **Save.**

You have now created a Salesforce Custom Object and uploaded data that can now be used through Content in a community. Your next step is add it to the community Home page.

1. Click on the CMS Home tab, and under All Experiences, open the **Workspaces** for your DXP Workshop Community.

2. Click on the **Content Management** tile. Under the tab **Content**, select the subtab for **Salesforce CRM**. Click on the **Add CRM Connections** button.

3. Search for **Local Event** and click the **+** button to add this object connection. Click **Save**.

4. Click on the **Collections** tab at the top of the page. Click the **New** button, give your collection the Name **Local Event Highlights**. Select the **Salesforce CRM** source, and click **Next**.

5. Under Select Object, choose **Local Event**, and select the Radio button for **All Records**. Click **Finish**.

All your CRM content is now available for use in the community! Unlike the metadata of the Content Type we saw before, each field on the Custom Object is now available metadata to organize when you present through the community. The next step is to add this content to your community Home page.

1. Click on the Content Management button in the top left corner of the page and select **Builder**.

2. In the content footer section of the layout, you added a CMS Collection component when setting up the home page. Click on that component, and in the component settings, click **Add Collection**. Choose **Local Event Highlights** and click **Save**.

3. Under Collection Settings, select the **Strip** layout, and set the **Slides to show at once** to **4**.

4. Under Content Settings, select the **Banner** layout. Deselect the checkboxes for **Show Metadata 1,** and **Show Metadata 2**.

5. Under Field Mapping, set Headline to **Name,** Subheading to **Description**, Flag to **Type**, Eyebrow to **Location**, Date to **Event Date**.

6. Under Field Mapping, set Image to **Image URL**. You will get warning messages about accessing external sites. Acknowledge the warnings, we will fix this after completing the component settings.

7. Under Component Style, set the Banner Height to **290px**, and the Content Width to **90%**.

8. Under Flag, set the flag colour to **rgb(5, 29, 67),** Alignment to **Top Right**, and the Border Colour Transparency to **0%**.

9. Under Headline, set the Headline Tag to **Heading 1**.

10. Click on the **Settings** button (gear icon) on the left of the screen, and select the **Security** tab. At the bottom of the page list is a section for CSP Errors. Click the **Whitelist URL** button for each of the listed sites.

11. The Experience Builder will refresh and the images will populate in the content collection.

Now that the component has been configured let's click **Publish** (top right corner) to confirm our changes. If you wish, click **Preview**. Then click **Back to Builder** to continue to the next Activity.

Module E: Extending Communities

Activity 20: Adding Workflow to Communities

One of the best ways to extend the functionality of your community is to include visual workflows that read, create, and/or edit data that exists within Salesforce CRM. This could include self-service case management use cases, lead registration, or any custom collection of information.

In this activity you will install a pre-built visual workflow (called a "Flow" in Salesforce) from the AppExchange, modify it to include some brand images, and then add to the home page of your community.

1. Open the following link in a new tab of the browser you are configuring your community: https://login.salesforce.com/packaging/installPackage.apexp?p0=04t6g000007KXc0

2. Login with the credentials for your DXP Workshop org.

3. Select the radio button for **Rename conflicting components in package**, and select the tile for **Install for All Users**. Click the **Install** button.

4. When the screen says **Installation Complete**, click **Done**.

5. In the Quick Find menu, start searching for **Flows** and select the menu link. You will see 10 flows setup in your org. The second one in the list will be **Cloudy's Fun Run Registration**. Click on the Flow Label link.

Flows allow you to build screens for a user to interact with by dragging-and-dropping components, very similar to how you did in Experience Builder. You can drag in elements to Get, Create, Update, and Delete records from within Salesforce. This makes Flows a powerful one-stop-shop for building out business processes.

1. The flow has already been built out for you, we just need to update images. Double-click on **Screen1** to open its settings. The third component on the screen shows a broken-image icon. Click on the component to open its configuration sidebar.

2. Delete the broken image and use the image button in the rich text editor to insert **stanley-park.jpg**. Click **Done** at the bottom of the screen.

3. Double-click on **Screen4** to open its settings. In the third component Delete the broken image and use the image button in the rich text editor to insert **group-running.png**.

Click Done at the bottom of the screen.

4. In the top right corner, click **Save As.** The default option is to save a new version of the Flow. Click **Save**. The builder will show warnings on saving, this is okay as its expected behaviour. Finally, click the **Activate** button.

You have now updated the visual workflow that you will add to your community. Let's now drop it on the Home page.

1. Return to Experience Builder for your DXP Workshop Community. You can find it by using the Quick Search in Setup to find All Communities, or you can find it under All Experiences on the CMS Home page.

2. On the **Home** page of your community, remove the **Featured Topics & Feeds** component from the central content section. You can always add it back in later.

3. In the Components menu on the left (lightning bolt icon), find the component **Flow** and add it to the central content section. Click on the Flow component to open up its configuration settings. Under Flow, replace {!flowName} with **Cloudy's Fun Run Registration**.

Now that the component has been configured let's click **Publish** (top right corner) to confirm our changes. In the Workspaces menu in the top left corner, click on **View DXP Workshop Community.** This will open the live community to see your flow in action!

Activity 21: Audiences, Branding Sets, and Component Visibility

One of the ways that you can personalize communities for your users is by tailoring the experience to the right audience of users. You can do this by creating page variations that are assigned to specific audiences, creating custom branding for a subset of users, right down to choosing whether components show for certain groups. Audiences can be defined based on the information we know about the User from their CRM records, what permissions we have given the User, or the User's location/IP address.

1. In Experience Builder, click on the **Theme** menu item (paintbrush icon) on the left. At the top of the pop-up will be a button with an arrow pointing down. Click on this button and choose **Manage Branding Sets**.

2. On the top row of buttons, click the **Manage Audiences** button (three people icon). Click **New Audience**.

3. Give your audience the name **Codey's Bootcamp Participants.**

4. Under Audience Criteria, Select the Criteria Type of **User > Contact > Department** and set the Value to **Bootcamp** and hit Enter. Click **Save**.

5. You can review the audience you have created (this is where you can manage many audiences in your community), and click **Done** when ready.

6. Click on the **New Branding Set Button** and give it the name **Codey's Bootcamp**. Click **Save.**

7. In the new tile created, click on the button with an arrow pointing down and select **Assign.** Select Codey's Bootcamp Participants and click the **Assign** button on the right. Click **Done.**

8. In the Theme menu click Colors and update the action Color to **rgb(151, 22, 22)**. Return to the Theme menu, click Images, and upload a new logo using **codey-logo-png**. Return to the Theme menu, click Fonts, and set the Primary Font to **Roboto Condensed**, and the Header Fonts to **Oswald**.

9. Return to the branding sets menu and toggle between the tiles to see how different audiences will see the site. Click **Preview** to see without all the settings menus.

Now that audiences have been created you can set page variation and component visibility by through a similar assignment approach.

Activity 22: Salesforce Surveys

Collecting data from users can be done in a couple of ways, from quick action buttons to visual workflows. Another method you may want to use is Surveys. Instead of creating CRM records, surveys have their own structure, analytics, and logic, and can be distributed through a community, a marketing email, or as at the conclusion of a business process like a case.

Experience Builder includes a Survey component that allows you to embed a Survey without needing to redirect to another site.

1. Up to this point in the workshop we have built our community experience in "Preview" mode, meaning that you haven't designated it active for use. Surveys require an activated community to work. Click on the Workspaces menu in the top left corner and select **Administration**.

2. Under Settings, click **Activate**.

3. Click the Administration menu button in the top left corner and select **Salesforce Setup**. In the quick find start typing **Survey Settings** and click the menu link. In the drop down for default community, select the **DXP Workshop Community.**

4. Click on the App Launcher in the top left corner, and search for **Surveys**. Click on the Tab result.

5. By default you will see the Recently Viewed list view. Click the menu button on the **Net Promoter Score** row, and select **Open Latest Version.**

6. This survey comes when you enable Surveys in Salesforce, and you will only need to ensure this survey can be seen in the community. Click on the **Send** state at the top of the page. Click the tile for **Get Link**, and select the tab for **Participants Outside Your Company**. Check the checkbox for **Don’t require authentication**. Close the pop-up.

7. Your survey is now ready for the community. Close this tab and return to Experience Builder for your DXP Workshop Community. You can find it by using the Quick Search in Setup to find All Communities, or you can find it under All Experiences on the CMS Home page.

8. Select the Pages menu from the top of the page (by default it says Home) and click **New Page**.

9. Select a **Standard Page** and choose the **Flexible layout**, and click **Next**. GIve your page the name **Net Promoter Score**, and click **Create**.

10. In your Components menu on the left, find the **Surveys** component and drag it into the main section. In the component settings, select the Survey Name **Net Promoter Score**.

11. In the Header, click on the **Navigation Menu**, and in the component Settings, click **Edit Navigation**.

12. Click on **Add Menu Item**, provide it with the Name **Member Survey,** select the Page **Net Promoter Score**, and check the checkbox for **Publicly available**. Click on **Save Menu**.

Now that the component has been configured let’s click **Publish** (top right corner) to confirm our changes. In the Workspaces menu in the top left corner, click on **View DXP Workshop Community.** This will open the live community to see your update navigation menu, and when the link is clicked, your embedded survey.