Phase 7: Integration & External Access

Objective To extend the application's functionality beyond internal administrators by creating a secure, external-facing customer portal. The goal is to provide customers with self-service capabilities, allowing them to log in and view their booking history, thereby enhancing customer engagement and satisfaction.

Key Activities & Screenshots Salesforce Experience Cloud was used to build the "Parking Portal."

- **Site Creation & Configuration:** A new portal was created using the "Customer Service" template. Membership was configured to grant access to users with the "Customer Community User" profile, ensuring only authorized customers can log in.

- **Custom Page Development:** A custom page named "My Bookings" was built using the drag-and-drop Experience Builder. A Record List component was added to this page and configured to display a list of the logged-in customer's Booking records, providing a personalized view of their history. The "My Bookings" page was then added to the portal's main navigation menu for easy access.

Outcome A fully functional and secure customer portal is now live. Customers can access their information on-demand, which reduces the support workload for administrators. This phase successfully demonstrates the ability to integrate the core Salesforce application with external-facing web experiences.

Members

All users with the selected profiles **OR** permission sets are members.

ℹ When you add a profile or permission set, new site members receive a welcome email message. If you want to prevent those site members from receiving welcome email messages, deselect the Send welcome email option.

Select Profiles

Search: [Customer ▾] for: [   ] [Find]

Available Profiles

Available Profiles
Authenticated Website
Authenticated Website
B2B Reordering Portal Buyer Profile
Customer Community Login User
Customer Community Plus Login User
Customer Community Plus User
Customer Portal Manager Custom
Customer Portal Manager Standard
External Apps Login User
External Identity User
High Volume Customer Portal
High Volume Customer Portal User

Add ▶
◀ Remove

Selected Profiles

Selected Profiles
System Administrator
Customer Community User

Select Permission Sets

[   ] [Find]

Available Permission Sets

Available Permission Sets
Developer Edition
Experience Profile Manager
SCRT2 Integration User

Add ▶

Selected Permission Sets

Selected Permission Sets
--None--

javascript:void(0);

Search Setup

Setup | Home | Object Manager ▾

[🔍 all sites]

SETUP
All Sites

Digital Experiences

Visit our Trailblazer Community | Help for this Page ❓

The list shows Experience Cloud sites in your org. Clicking on the URL takes you directly to the site. If you're not a site member, the URL isn't linked. Archived sites aren't included in this list. Check the Digital Experience app in Lightning Experience page to see your archived sites.
Maximum number of published and unpublished sites: 100

All Sites [New]

Action	Name	Description	Framework	URL	Status
Workspaces | Builder	Parking Portal		Aura	https://orgfarm-2c42602007-dev-ed.develop.my.site.com/parkingportal	Preview

My Bookings

Search... | SEARCH

HOME | TOPICS | MY BOOKINGS

Template Header Bottom

Content Header

⚡ Record List

Accounts
All Accounts ▾ | 📌

New | Printable View | Assign Label

14 items • Sorted by Account Name • Filtered by All accounts • Updated a few seconds ago

🔍 Search this list...

		Account Name	▾	Acc... ▾	Billing State/P... ▾	Phone	▾	Type	▾	Account ... ▾	
1	☐	Burlington Textiles Corp of America			North Carolina	(336) 222-7000		Customer - Direct		OEPIC	▾
2	☐	Dickenson plc			Kansas	(785) 241-6200		Customer - Channel		OEPIC	▾
3	☐	Edge Communications			Texas	(512) 757-6000		Customer - Direct		OEPIC	▾
4	☐	Express Logistics and Transport			Oregon	(503) 421-7800		Customer - Channel		OEPIC	▾
5	☐	GenePoint			California	(650) 867-3450		Customer - Channel		OEPIC	▾
6	☐	Grand Hotels & Resorts Ltd			Illinois	(312) 596-1000		Customer - Direct		OEPIC	▾
7	☐	Pyramid Construction Inc.				(014) 427-4427		Customer - Channel		OEPIC	▾