Salesforce Experience Cloud - Building powerful, CRM driven customer facing websites without code

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Salesforce Experience Cloud - Building powerful, CRM driven customer facing websites without code **1**

Environment Setup - Pre Work (🕰 15 mins) **2**

⛔ Before You Get Started (🕰 15 mins) 2

Enable Digital Experience (🕰 3 mins) **4**

Create your customer facing portal / web site (🕰 3 mins) **5**

Customize your customer portal (🕰 5 mins) **8**

Enable Knowledge (🕰 10 mins) **10**

Configure Data Categories (🕰 10 mins) **12**

Customize Knowledge Articles Page (🕰 15 mins) **14**

Create Knowledge Article (🕰 15 mins) **16**

Create profile for customer portal users **22**

(🕰 10 mins) **22**

Enable Knowledge Article Access to Users (🕰 10 mins) **23**

Configure knowledge articles to display in customer portal (🕰 20 mins) **25**

Configure Featured Topics to display in customer portal (🕰 10 mins) **29**

Configure Navigational Topics to display in customer portal (🕰 5 mins) **31**

Configure new knowledge article page for guest and customers (🕰 15 mins) **31**

Enable profile members that can access customer portal (🕰 10 mins) **34**

Enable customer portal for guest / unauthenticated users (🕰 15 mins) **35**

Enable Guest Users to submit cases 39

Create sample customer and test (🕰️ 15 mins) 39

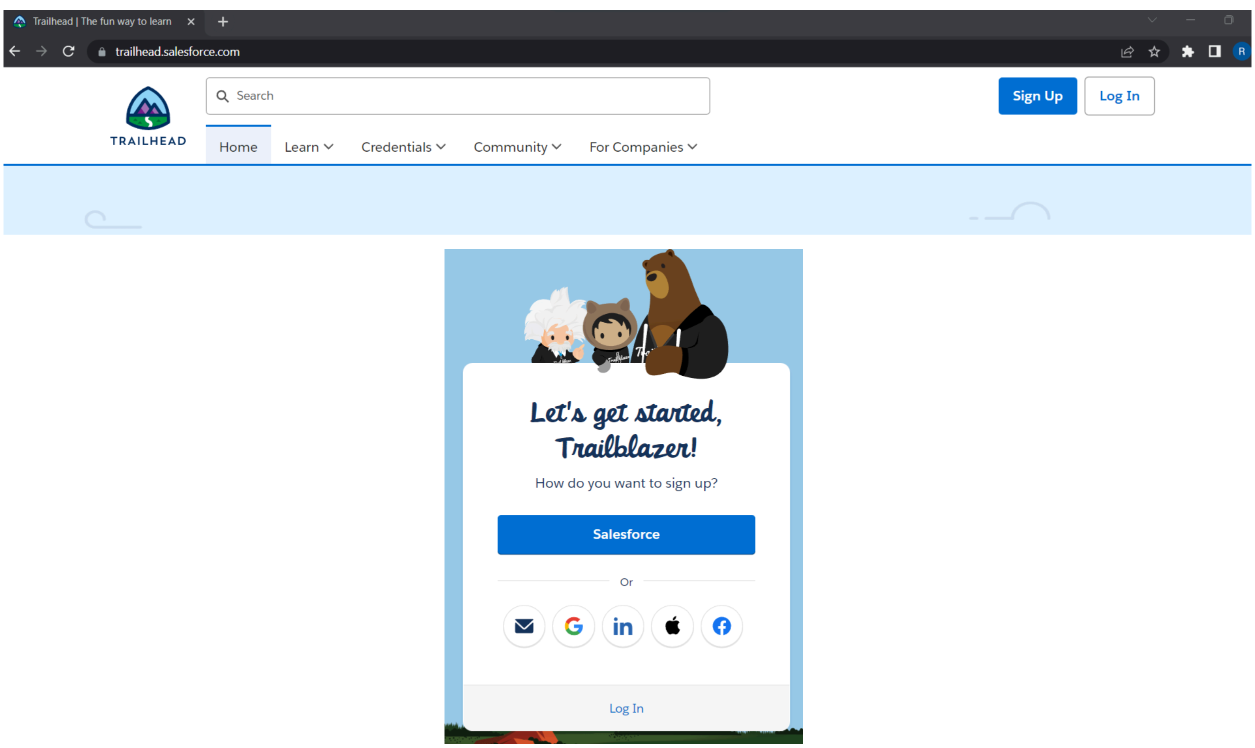
Style your website (🕰️ 15 mins) 40

Environment Setup - Pre Work (🕰️ 15 mins)

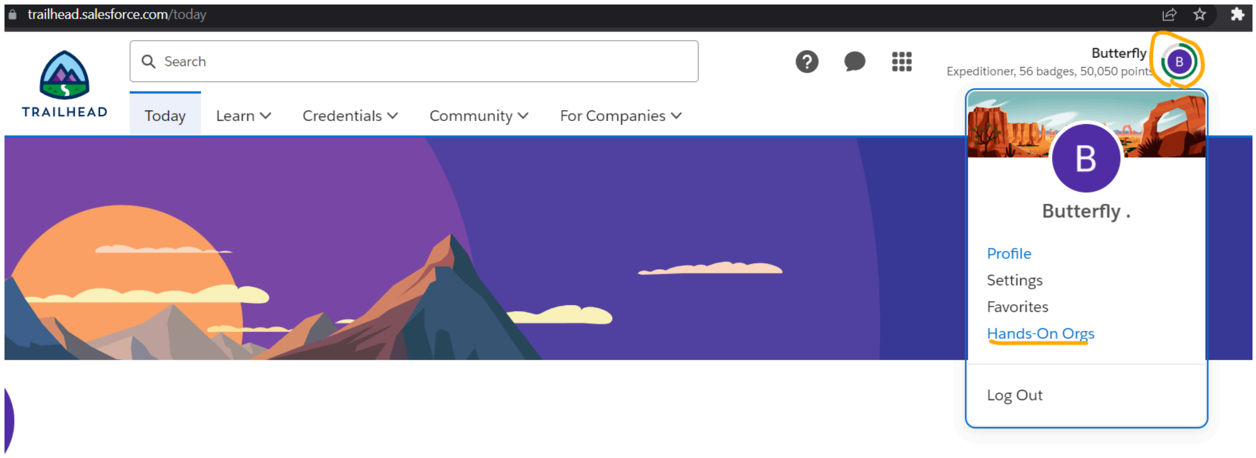
⛔ Before You Get Started (🕰️ 15 mins)

1. Ensure you have signed up in https://trailhead.salesforce.com using one of the below options

📒**Note: If you already have a trailhead account, skip to step 2**

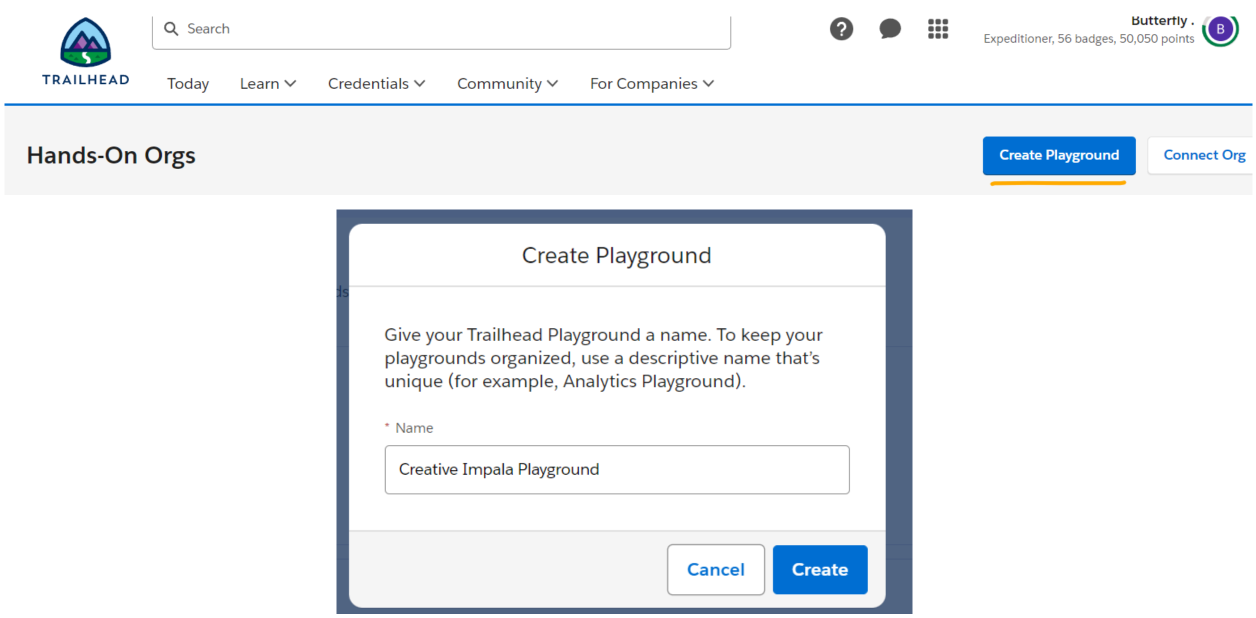


2. After successful sign-in, click on hands-on orgs



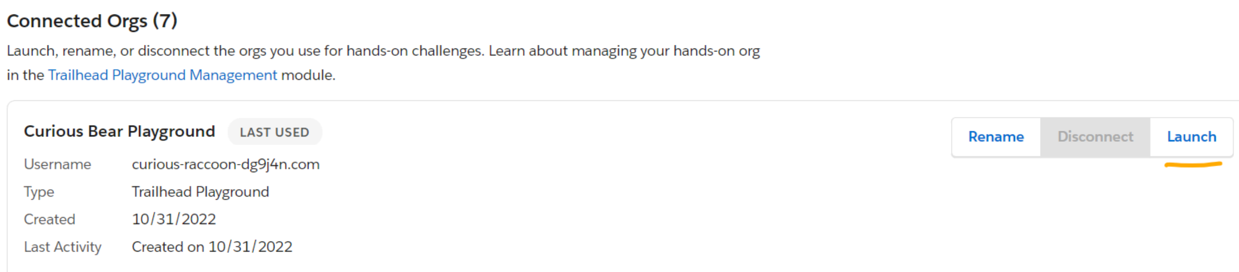
3. Create a new playground,

a. Click on “Create Playground”
b. Leave default name as is
c. Click create



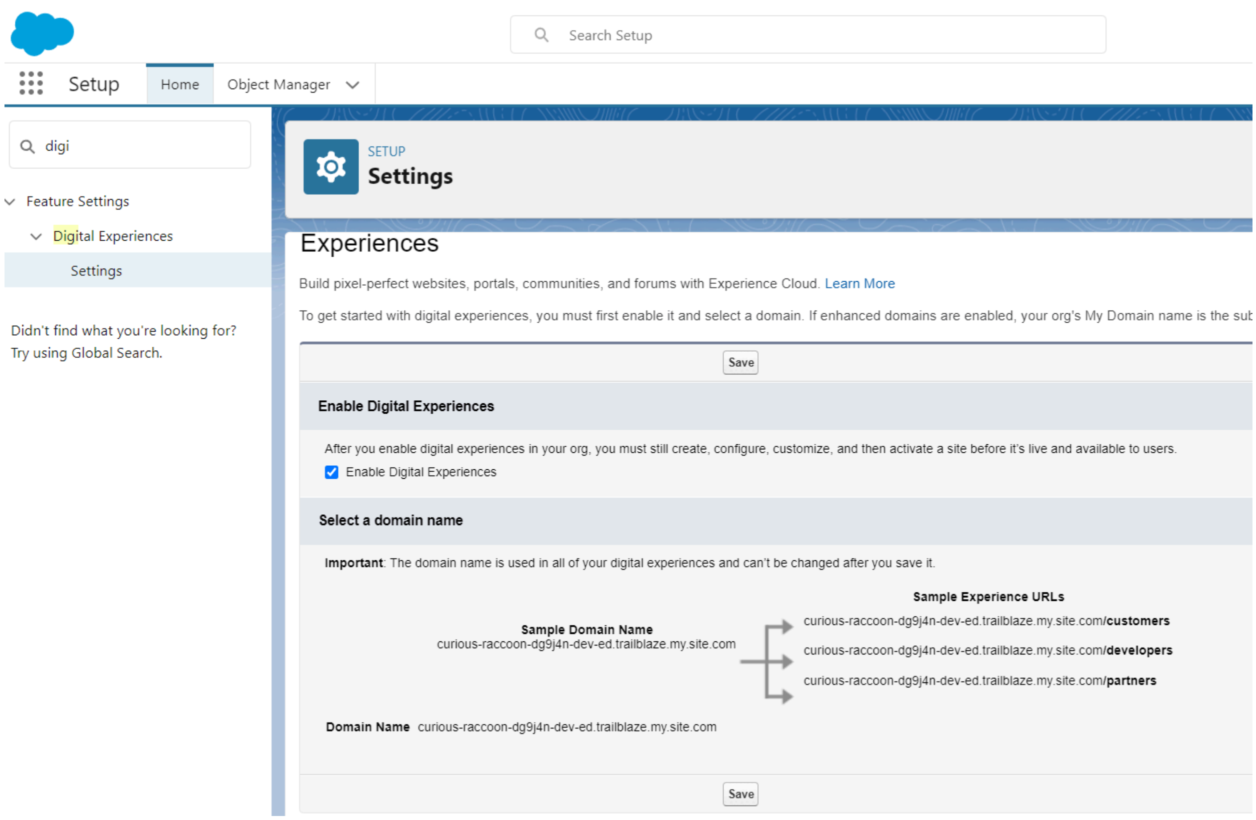
⌛ **Wait for the playground / environment to get created**

4. Use “Launch” button to open the newly created playground environment



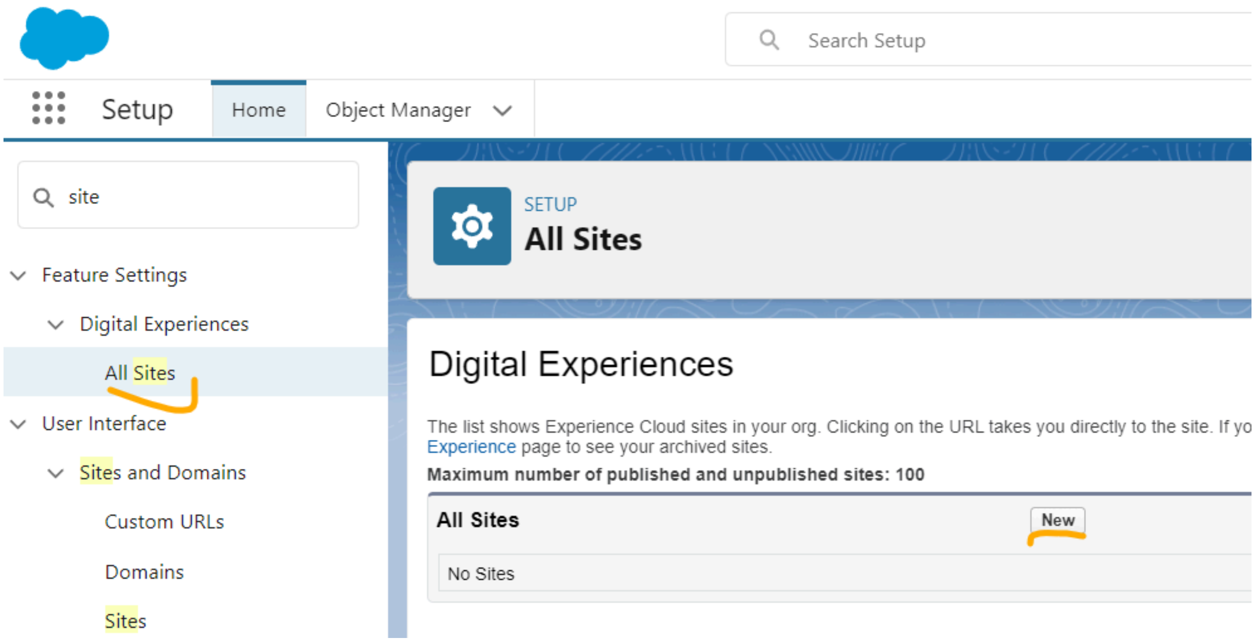
Enable Digital Experience (🕰 3 mins)

5. Once playground org is launched,
    a. Click on Setup
    b. Search for ‘Digital’ in Quick find text box
    c. Click on “Settings”
    d. Click on checkbox “Enable Digital Experiences” and Save
    📒Note: if a popup prompts , click ok and go ahead with save

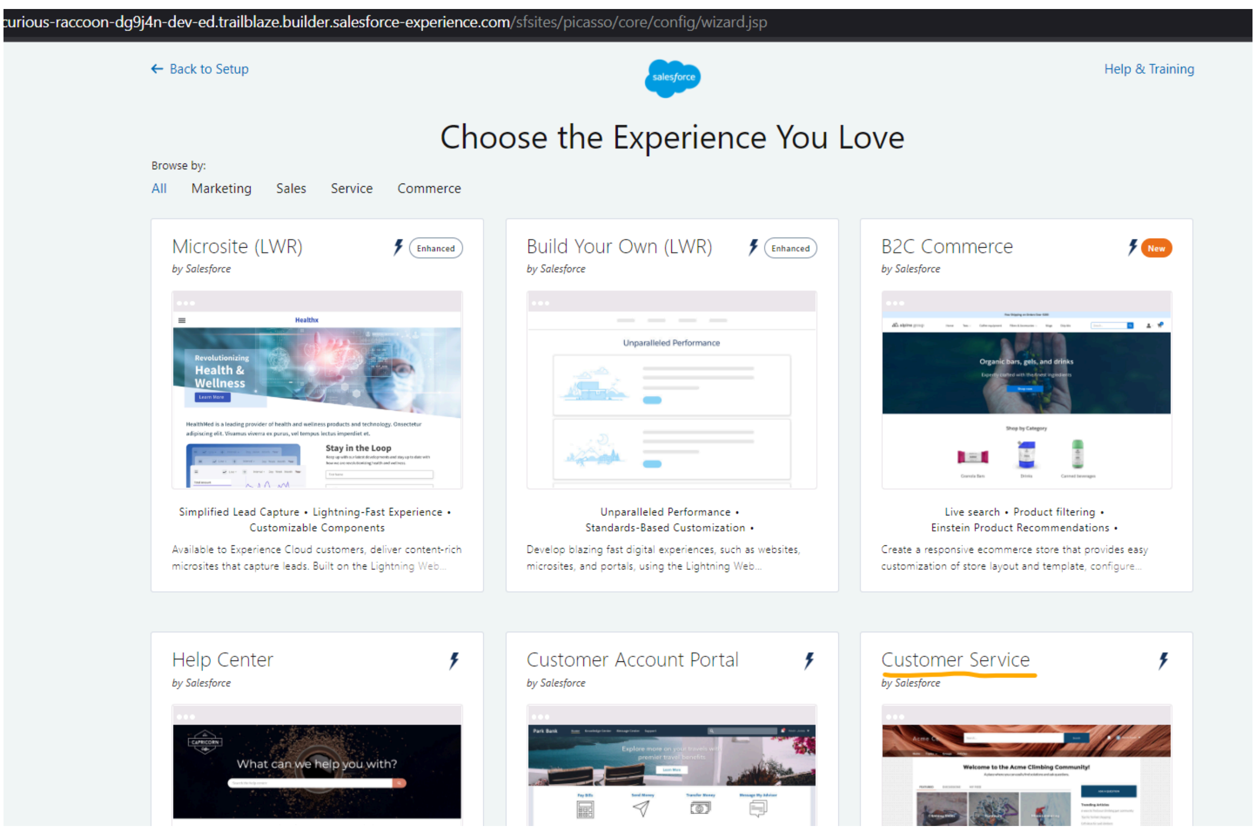


Create your customer facing portal / web site (🕰️ 3 mins)

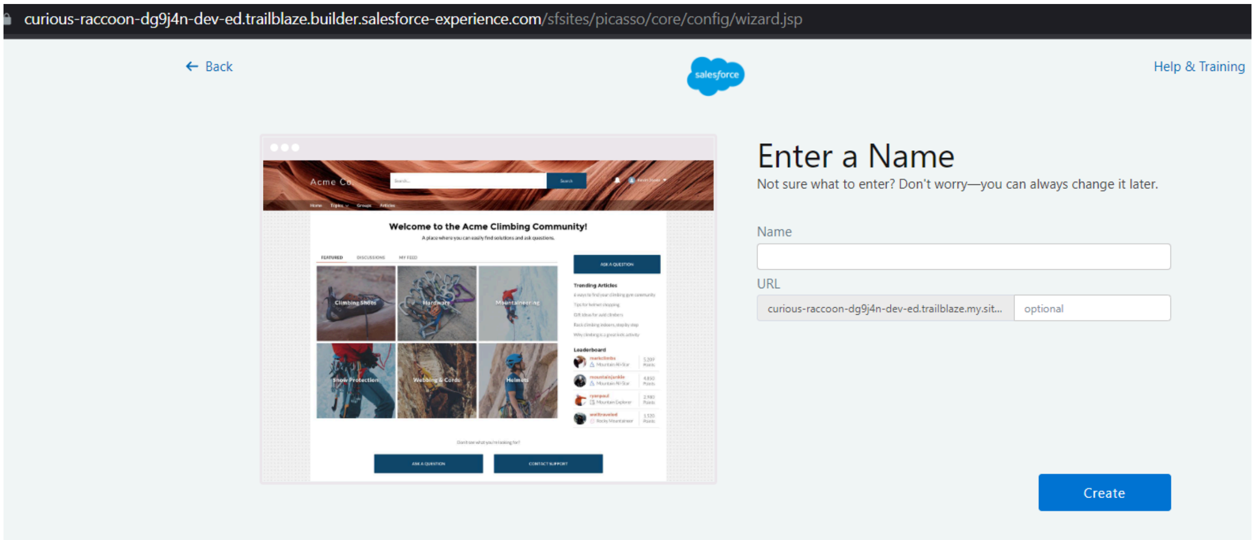
6. Once Digital Experiences feature is enabled, you will start seeing additional options to create website
   a. Click on Setup
   b. Search for ‘sites‘ in Quick find text box
   c. Click on “All sites” under Digital Experience
   d. Click on ‘New’
   e. Choose ‘Customer Service Template’
   f. Enter Name that you would like to give for your website



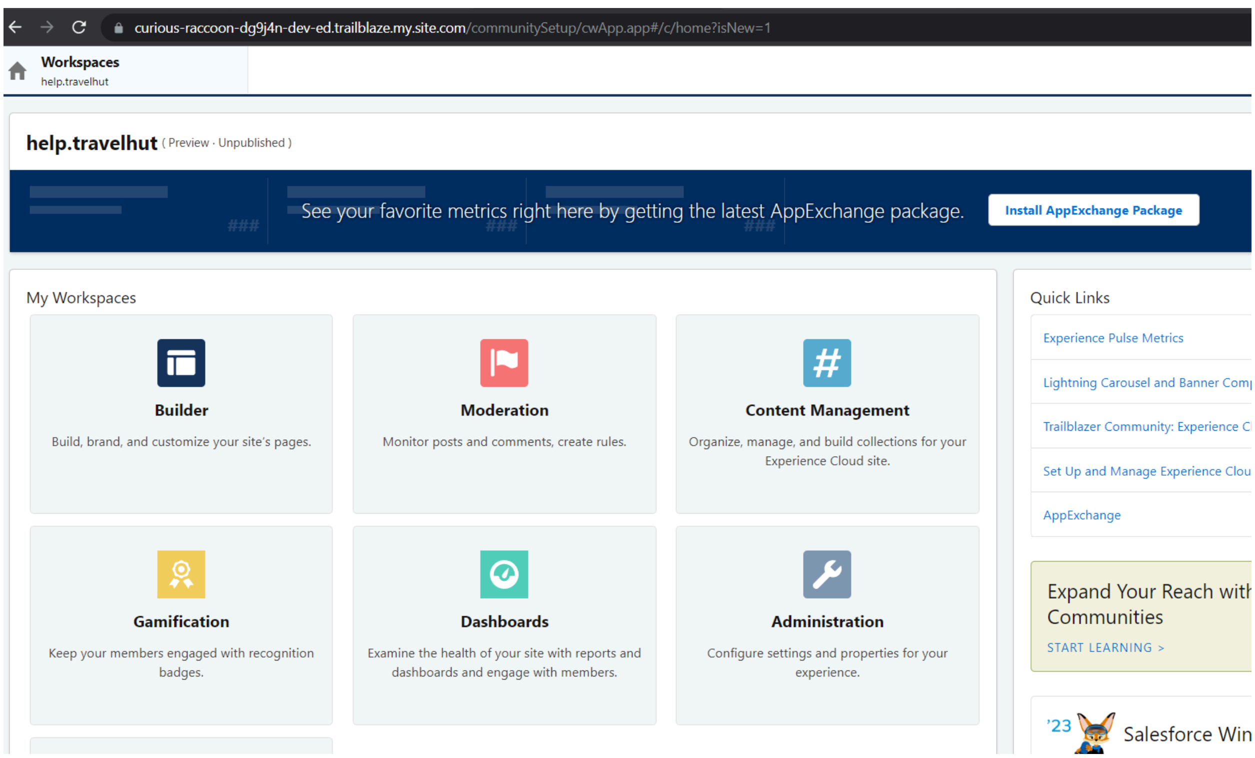
Search Setup
Setup
Home
Object Manager
site
Feature Settings
Digital Experiences
All Sites
User Interface
Sites and Domains
Custom URLs
Domains
Sites
SETUP
All Sites
Digital Experiences
The list shows Experience Cloud sites in your org. Clicking on the URL takes you directly to the site. If yo
Experience page to see your archived sites.
Maximum number of published and unpublished sites: 100
All Sites
New
No Sites



curious-raccoon-dg9j4n-dev-ed.trailblaze.builder.salesforce-experience.com/sfsites/picasso/core/config/wizard.jsp
Back to Setup
Help & Training
Choose the Experience You Love
Browse by:
All
Marketing
Sales
Service
Commerce
Microsite (LWR)
Enhanced
by Salesforce
Simplified Lead Capture • Lightning-Fast Experience • Customizable Components
Available to Experience Cloud customers, deliver content-rich microsites that capture leads. Built on the Lightning Web...
Build Your Own (LWR)
Enhanced
by Salesforce
Unparalleled Performance • Standards-Based Customization •
Develop blazing fast digital experiences, such as websites, microsites, and portals, using the Lightning Web...
B2C Commerce
New
by Salesforce
Live search • Product filtering • Einstein Product Recommendations •
Create a responsive ecommerce store that provides easy customization of store layout and template, configure...
Help Center
by Salesforce
What can we help you with?
Customer Account Portal
by Salesforce
Customer Service
by Salesforce



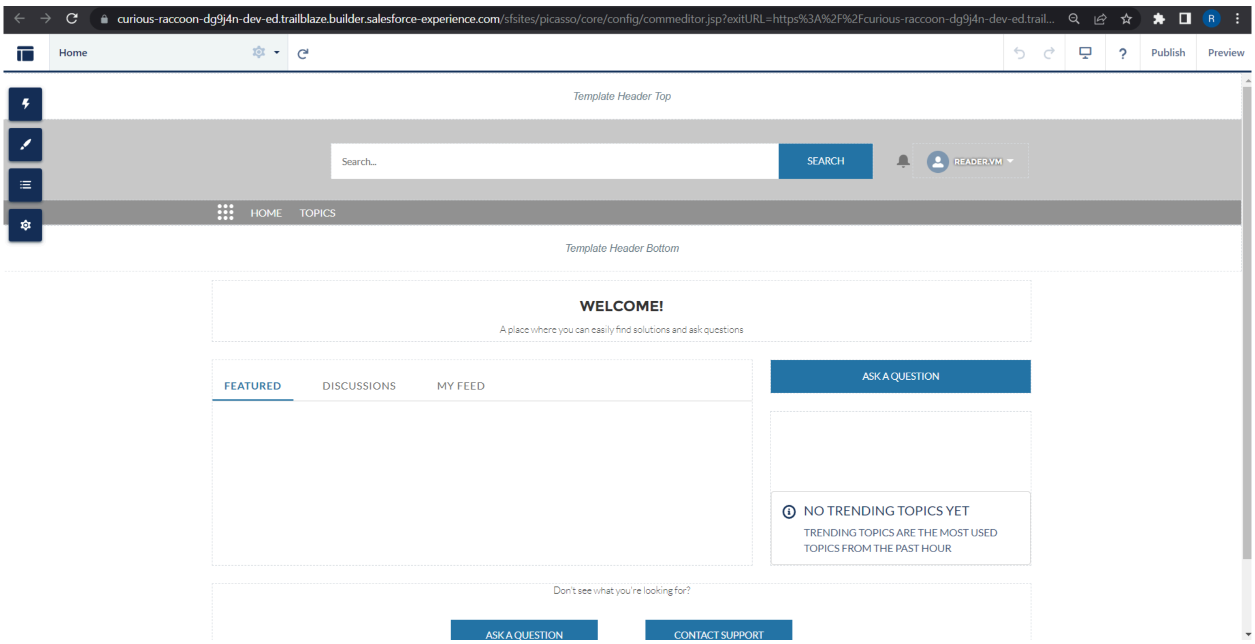
⌛ **Wait for the site to get created like the below one**



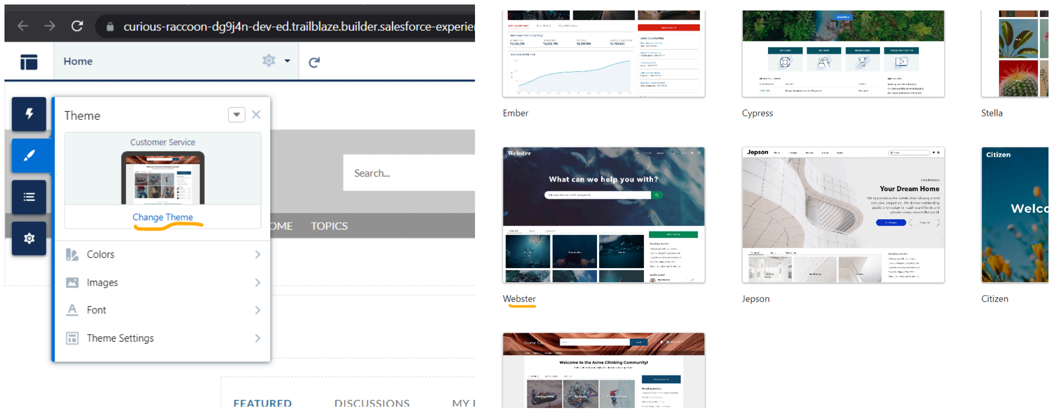
Customize your customer portal (🕰️ 5 mins)

7. Once website is created , you will start seeing options to further modify and manage website per your needs

1. Click on Setup
2. Search for ‘sites‘ in Quick find text box
3. Click on “All sites” under Digital Experience
4. You will see the site created in the previous step in list of all sites
    4.1. Click on ‘Builder’
5. Website will open in a configuration mode like below

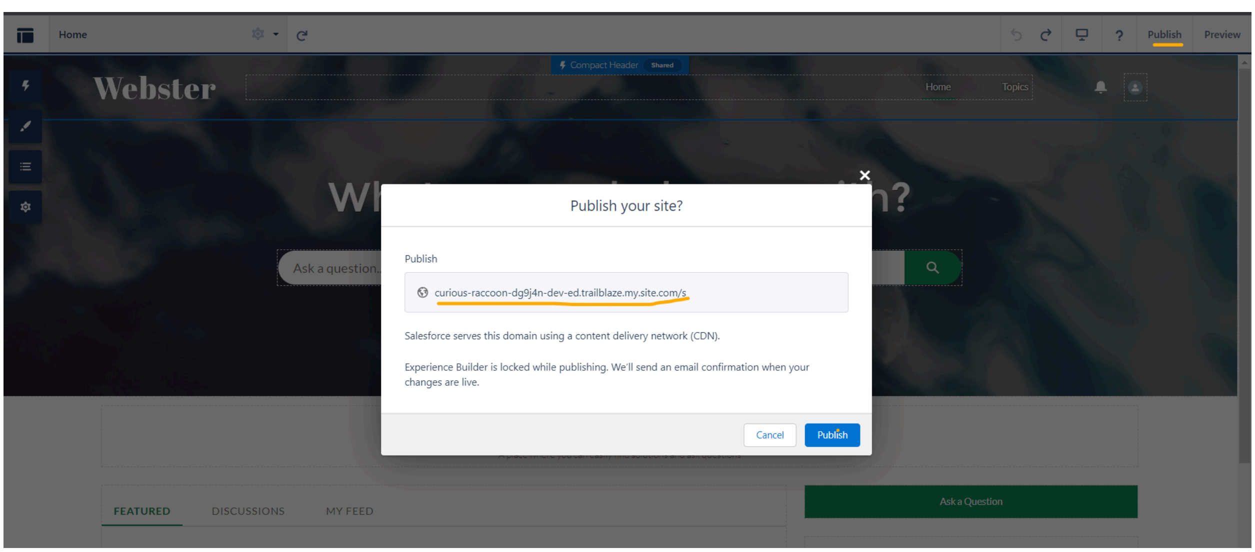


6. Open “Theme” option on the left panel
    6.1. Click on ‘Change Theme’
    6.2. Choose”Webster” and “Activate”



7. Preview your changes

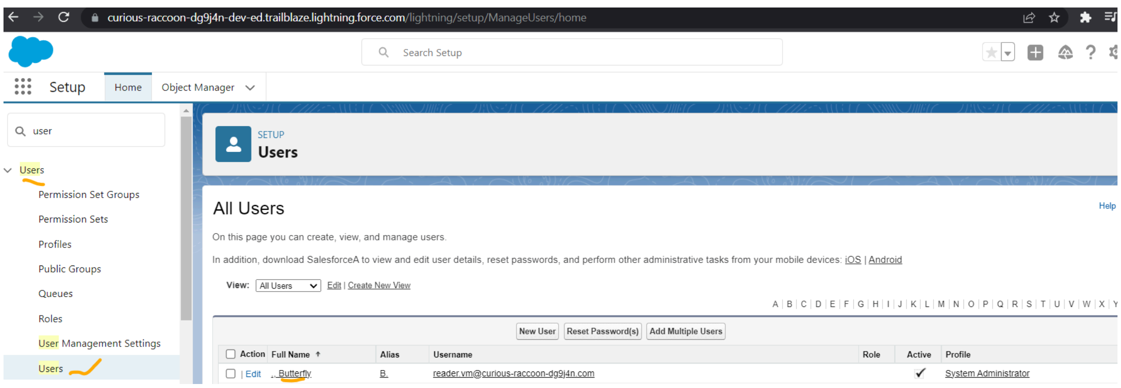
8. Publish your changes
   - SF will provide a default domain for your website and create a URL link to the site
   - An email will be sent confirming that the changes are published with a URL to access the site

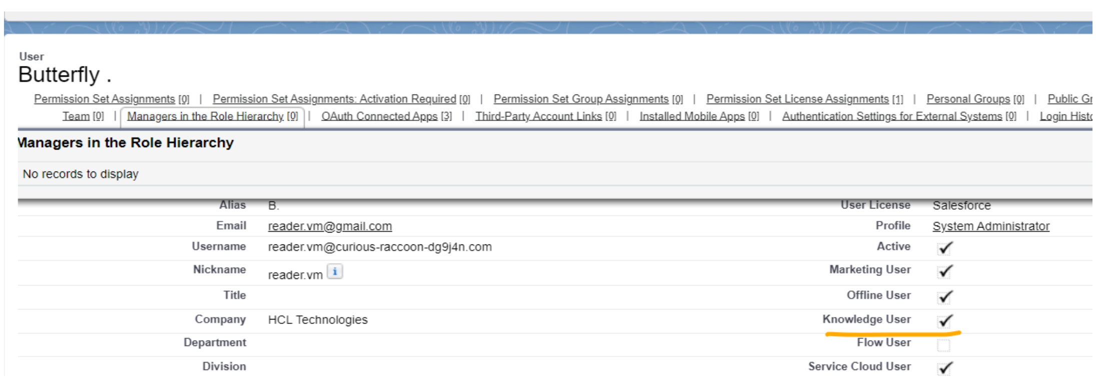


Enable Knowledge (🕰️ 10 mins)

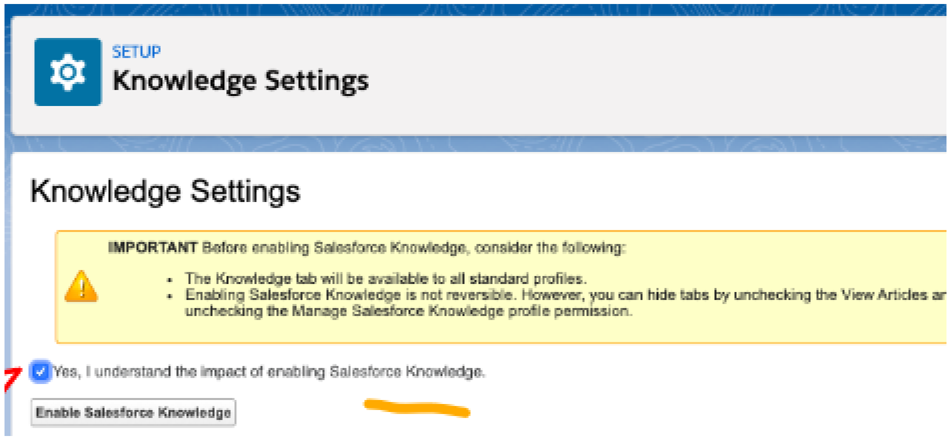
It is time to create articles to get posted on customer portal

9. Enable Knowledge User
   9.1. Click on Setup
   9.2. Search for ‘users’ in Quick find text box
   9.3. Find the org. Admin user (profile:System Administrator), click on the Name link
   9.4. Enable “Knowledge User” checkbox



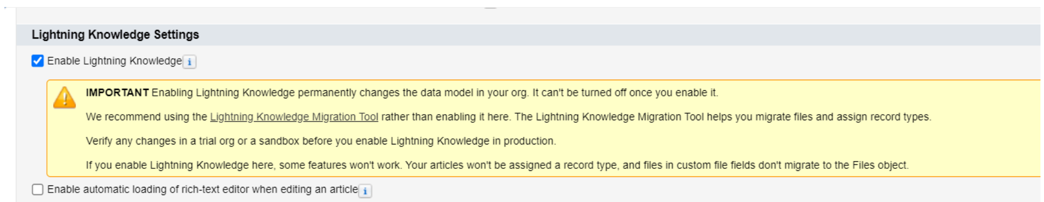


10. Configure Knowledge settings
    10.1. Click on Setup
    10.2. Search for ‘Knowledge’ in Quick find text box
    10.3. click on ‘Knowledge Settings’
    10.4. Enable Salesforce Knowledge by clicking the button

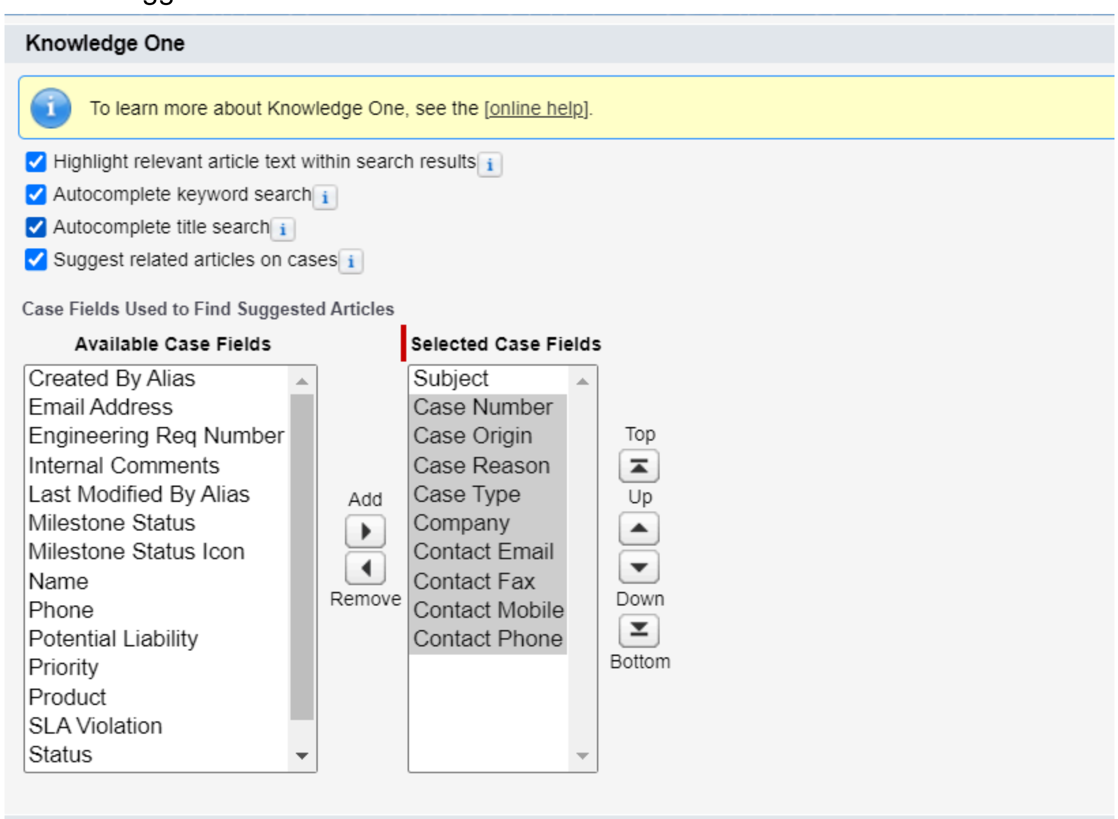


10.5. Once enabled, click on ‘Edit’ in ‘Knowledge Settings page

10.6. Enable Lightning knowledge



10.7. Enable ‘Suggest related articles on cases’ and add fields as below

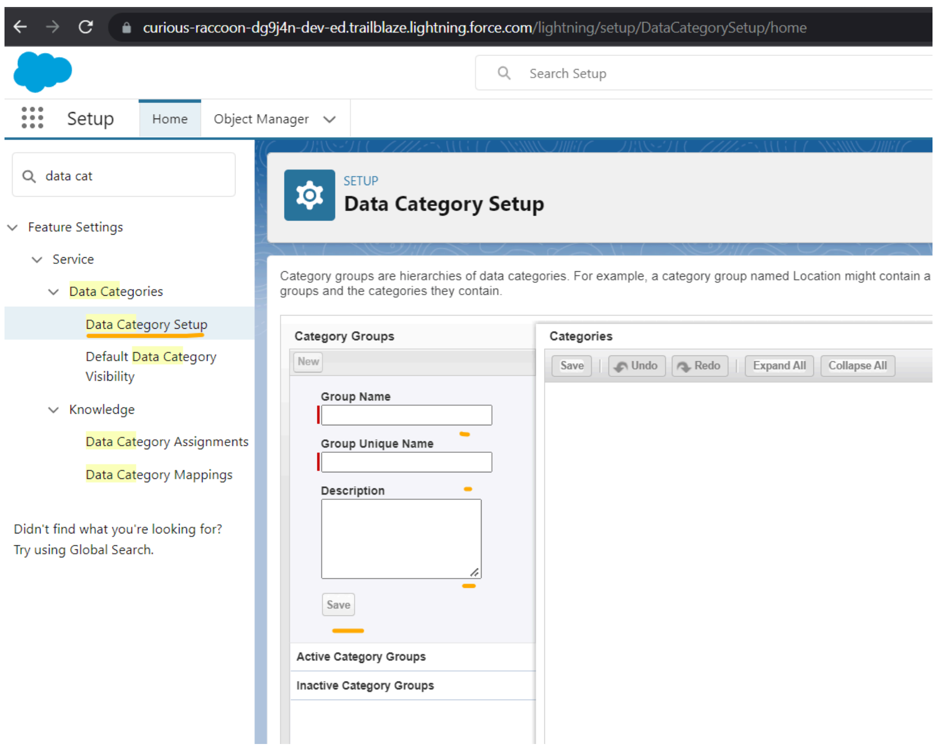


10.8. Scroll up and click on Save

Configure Data Categories (🕰️ 10 mins)

Data Category enables us to define visibility for knowledge articles

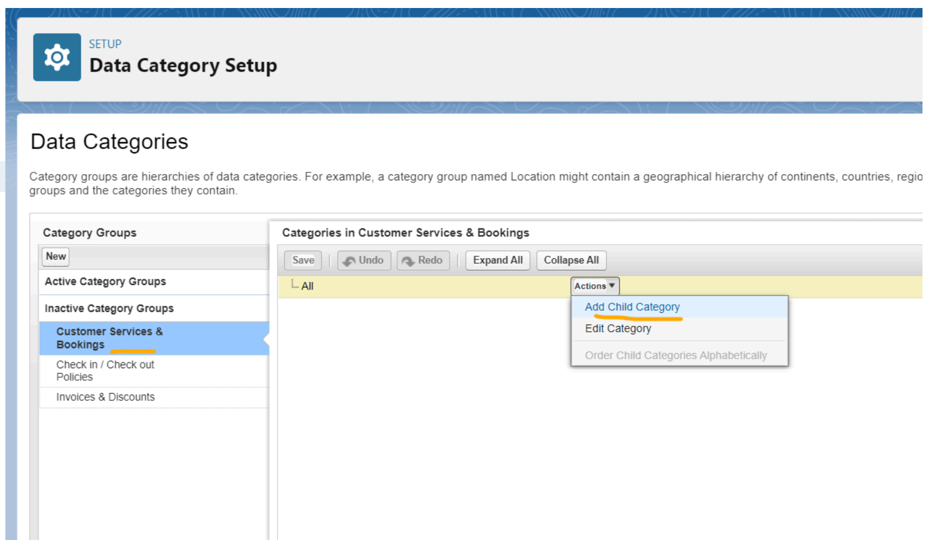
11. Configure Data Category
    11.1. Click on Setup
    11.2. Search for ‘Data Category’ in Quick find text box
    11.3. Click on ‘Data Category Setup and Edit

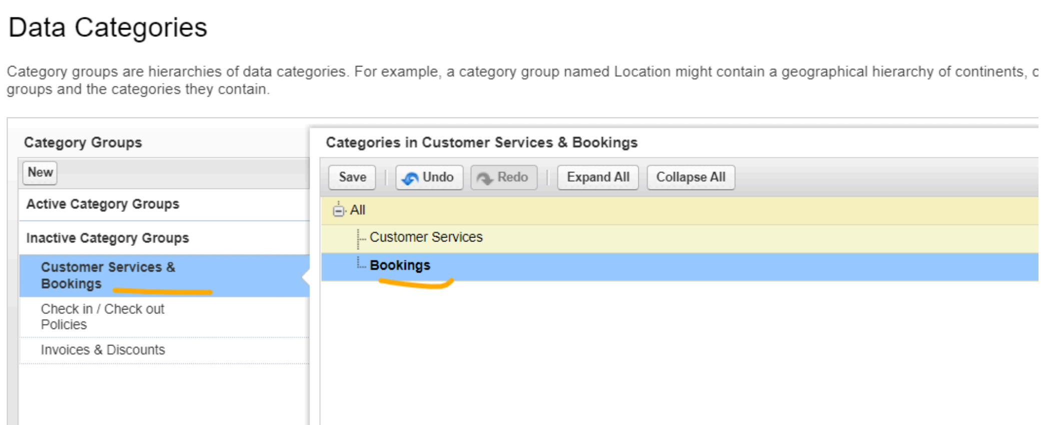


    11.4. Enter Group Name & Description. Refer the below table
        11.4.1. Group Unique Name gets automatically populated
        11.4.2.

Group Name	Description	Sub Group Name / Child Category
Customer Services & Bookings	Articles in regards to customer services & bookings are grouped under this group	1. Customer Service 2. Booking

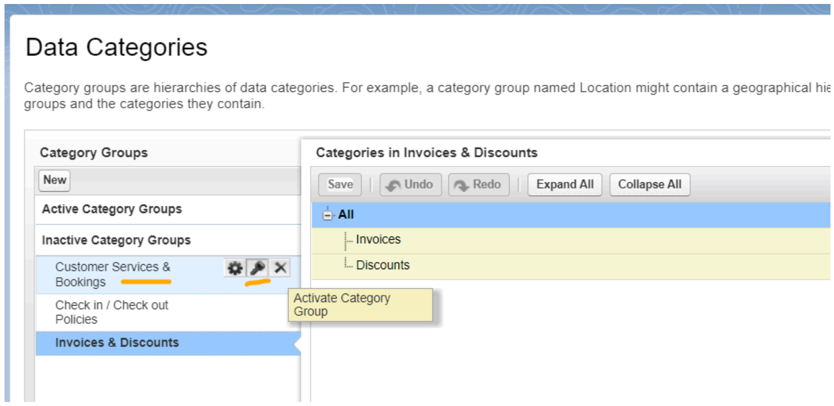
	name	
Check in / Check out Policies	Articles in regards to hotel checkin and check out policies are grouped under this group name	
Invoices & Discounts	Articles in regards to customer invoices & discounts are grouped under this group name	1. Invoice 2. Discounts



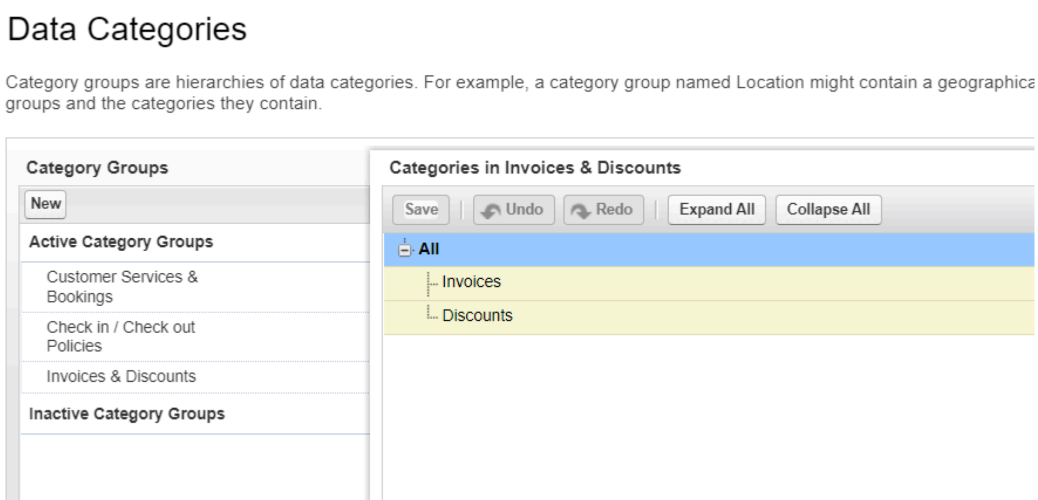


11.5. Click on Save

11.6. Activate each category groups



11.7. Final list of active data category groups

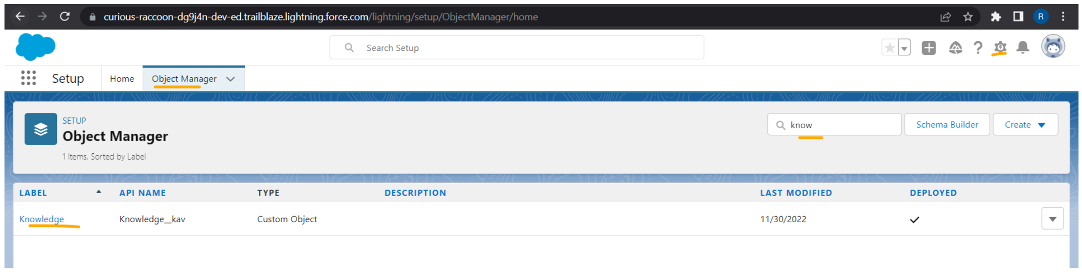


Customize Knowledge Articles Page (🕰️ 15 mins)

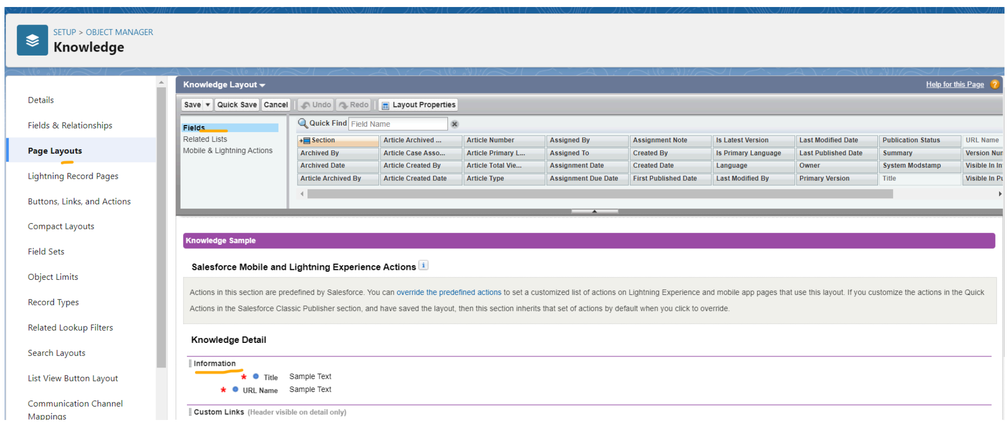
By default, you will see only a few fields on the knowledge articles page. We can customize further and include fields as per our needs

12. Customize Page Layout
    12.1. Click on Setup
    12.2. Click on Object Manager

12.3. Search for 'Knowledge' in quick find

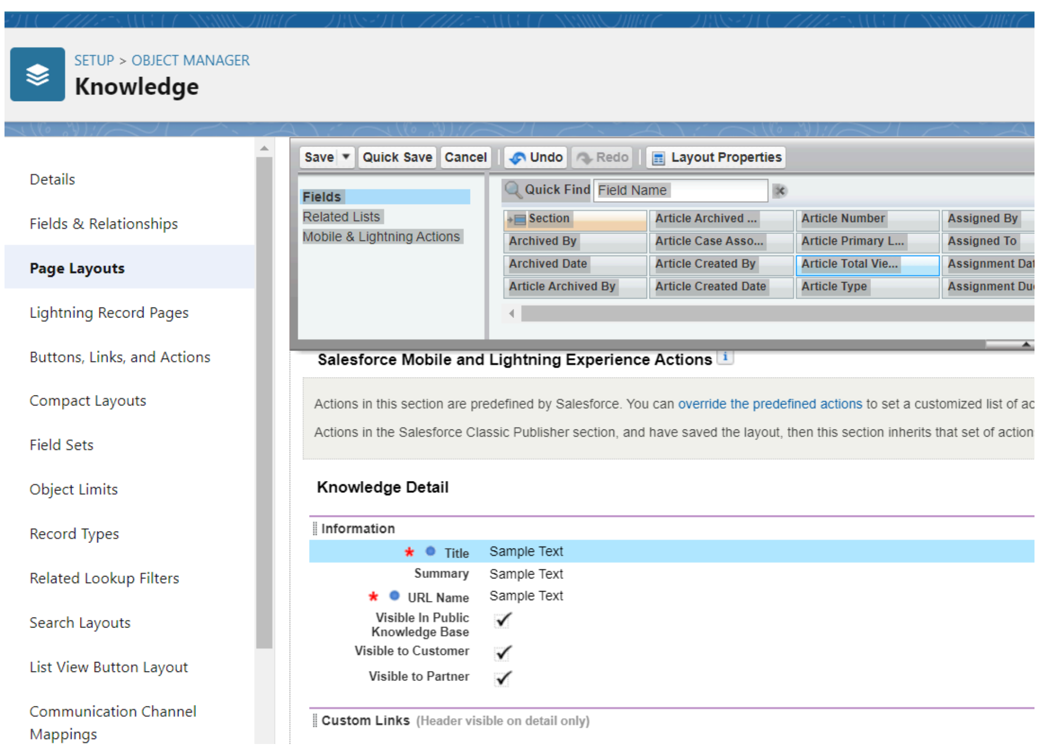


12.4. Click on Knowledge > Page Layouts > Knowledge Layout



12.5. From fields, we can drag and drop fields into 'Information' section that we would see when knowledge article is created

12.6. Ensure the fields as shown in the below screen shot have been included



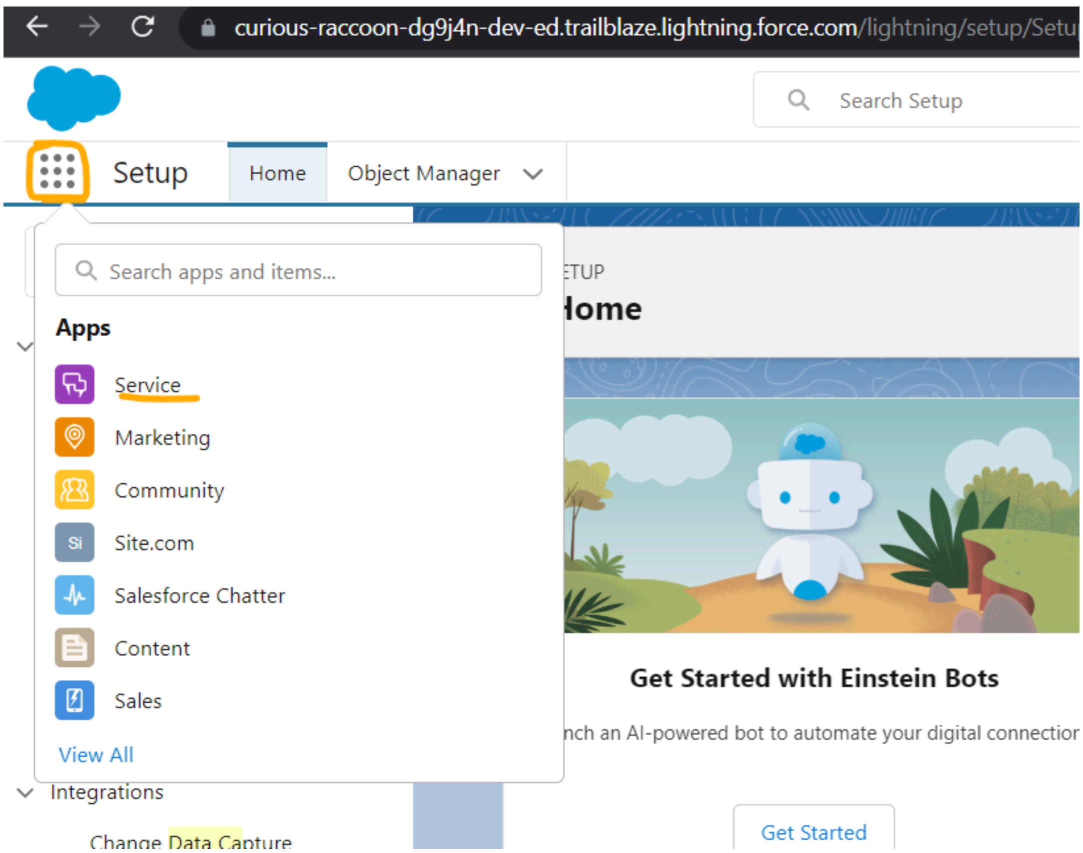
12.7. Once fields are added, click on Save

Create Knowledge Article (🕰️ 15 mins)

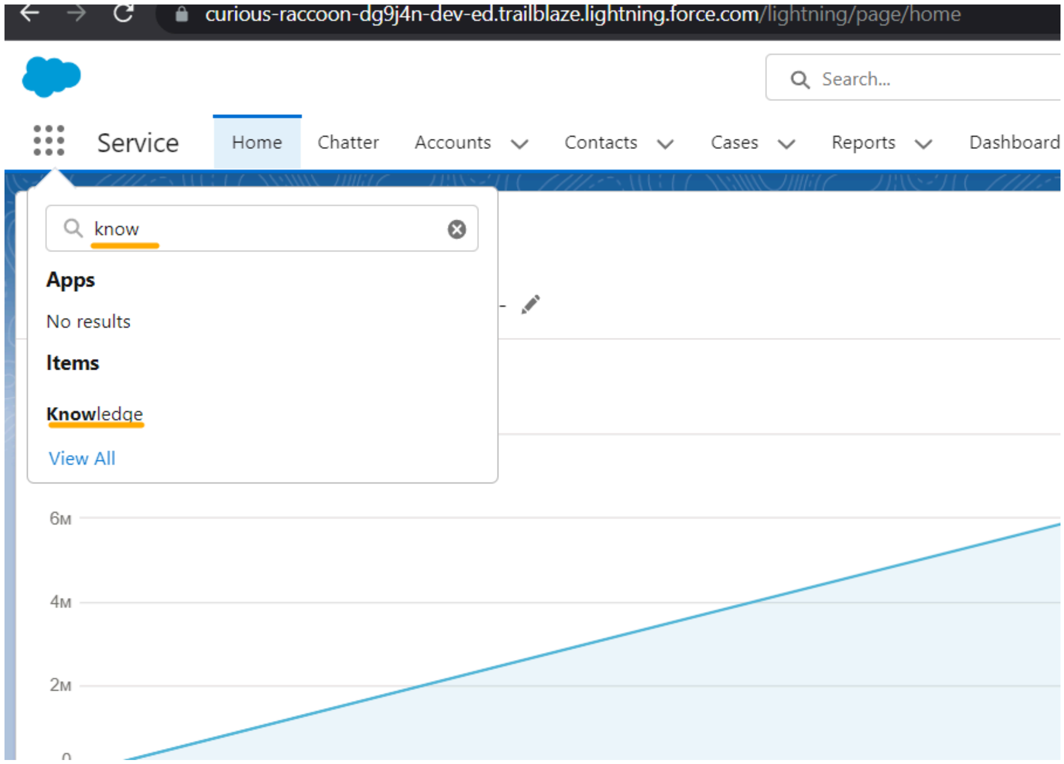
Now, we can start creating knowledge articles to show in our customer portal

13. Create and Publish Articles

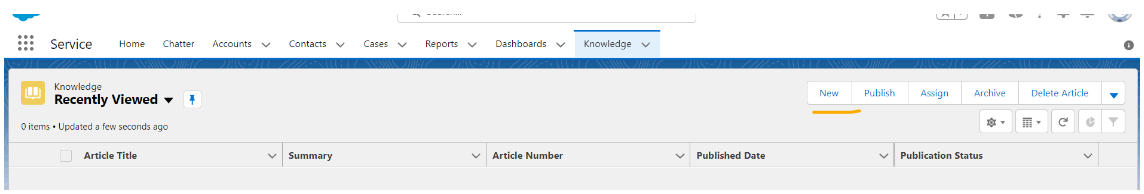
13.1. Click on App Launcher > Service



13.2. Click on App launcher again and search for knowledge



13.3. Click on ‘New’



13.4. Start adding

13.4.1. Title & Summary

13.4.2. Ensure Visible to public knowledge base check box is selected

13.4.3. URL name get auto populated

13.4.4. Once an article is created, map the same against a “Data Category”

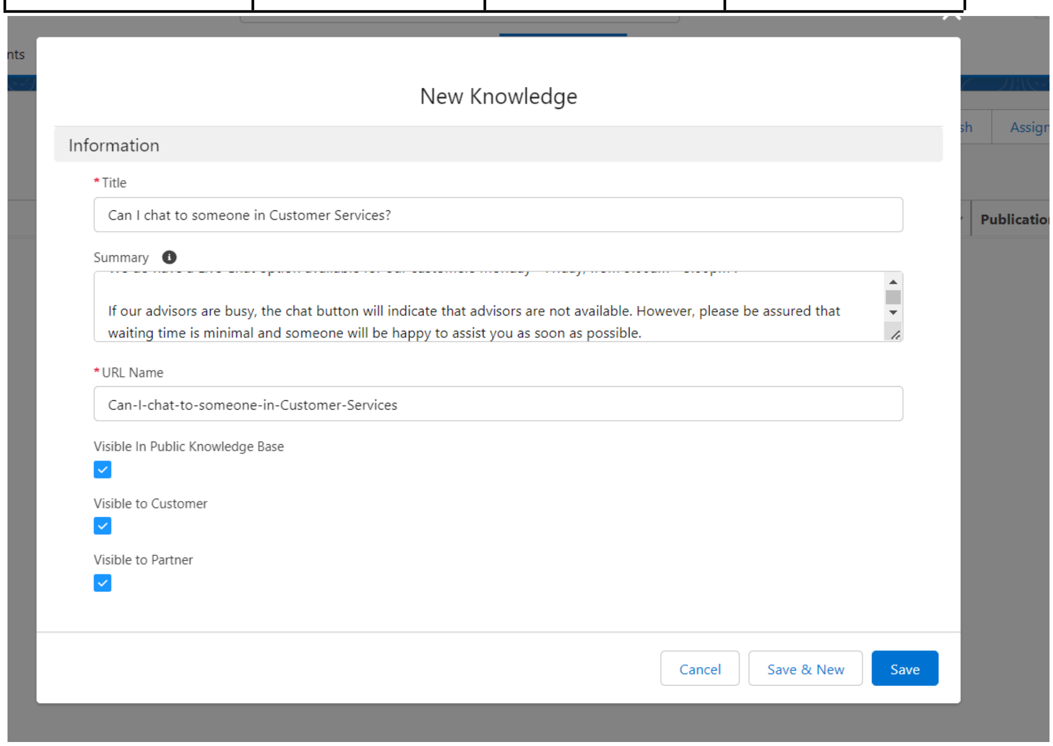
Title	Summary	Visible to Public / Customer/ Partner	Data Category
Can I chat to someone in Customer Services?	We do have a Live Chat option available for our customers Monday - Friday, from 9:00am -	Yes	Customer Services

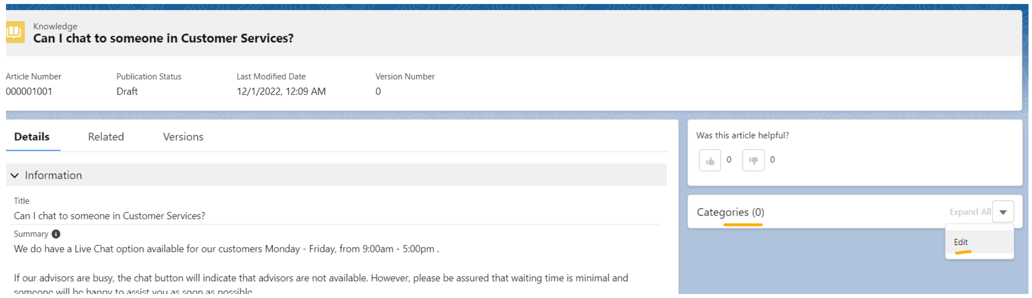
	5:00pm . If our advisors are busy, the chat button will indicate that advisors are not available. However, please be assured that waiting time is minimal and someone will be happy to assist you as soon as possible.		
Can I Amend My Bookings?	All of our bookings can be amended online via the Manage my Bookings section of the website or by calling Central Reservations*, subject to availability For Flexible Rate bookings, you will only be charged for any nights that are added to your existing bookings. If you are changing the dates of your reservations, you will be charged or refunded the difference based on the new rate. For Saver rate bookings, you	Yes	Bookings

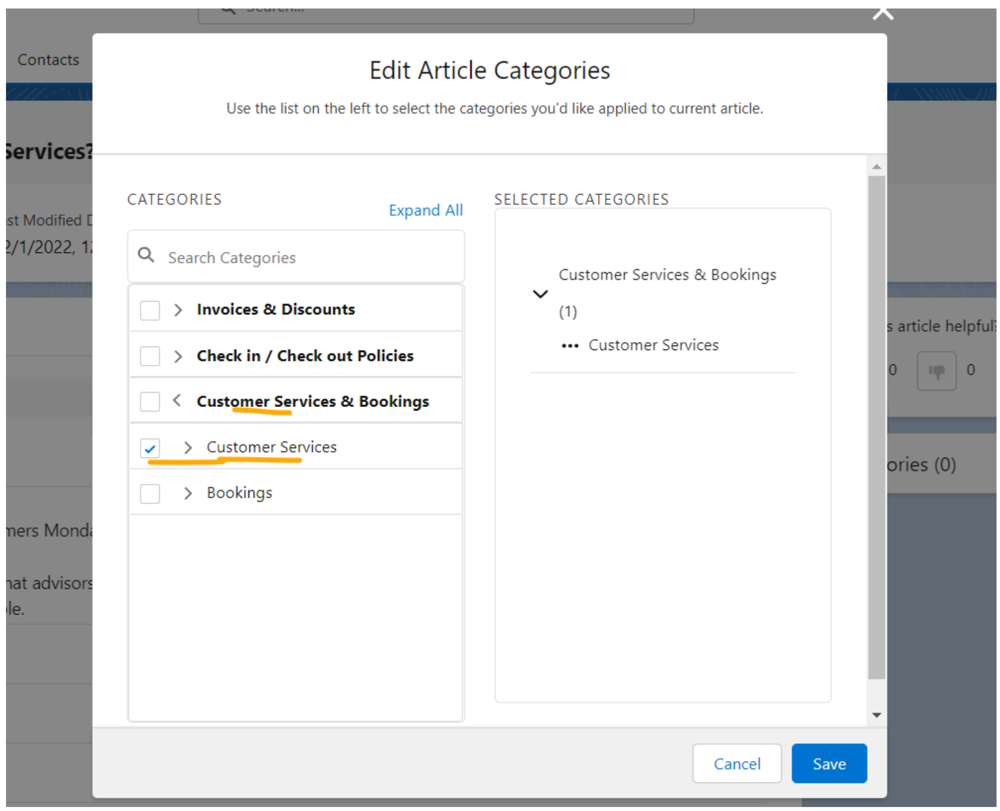
	will be charged a £10 fee to amend and the same rate may also need to be available for the new dates. All extras are also non refundable. You will be charged for any additional nights added or date changes. If the rate is cheaper for the dates you are amending you will not be refunded the difference. The location of the hotel cannot be changed on any of our bookings.		
Do you allow pets?	We love our furry friends at Travelodge and up to two domesticated pets per room can stay with you. It remains the owners responsibility to ensure that any pets do not cause any disturbance to other customers. This service costs $20 per pet, per stay and is payable either in	Yes	Check in / Check out policies

	advance (by selecting the service as an extra on your website booking) or at check in at the hotel. Please note that Guide dogs, Hearing dogs, and other animals to aid disability are exempt from the charge (customers should select the 'no pets' option from the extras page).		
What time is Check In/Check Out?	Customers can check-in to our 24 hour manned desks, any time after 3pm. If you would like to arrive any earlier then our Hotels offer an early check-in service for a fee of £10.00 which allows guests to check-in at 12 noon. Customers will need to ensure they are checked out by 12 noon on the day of departure, and just drop their key back at our reception desk. If you would	Yes	Check in / Check out policies

	like to check out late, we also offer this extra for a fee of £10.00. Guests can check out at 2pm instead of midday and the staff will be happy to add to this your booking if you inform them upon arrival.In addition either one of these extras can be purchased when creating a booking on our website, or through our Central Reservations Team		



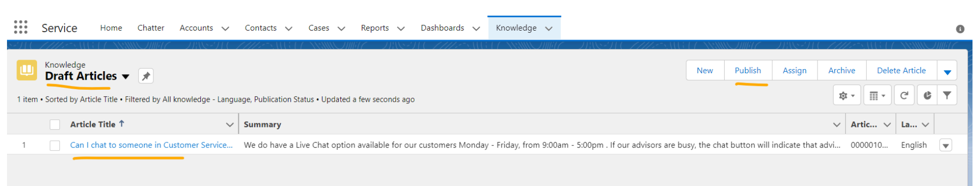




13.4.5. Repeat the steps and create as many articles as you need

13.4.6. Once a daft version is created, you should publish the article

13.4.6.1. All draft versions are listed as below

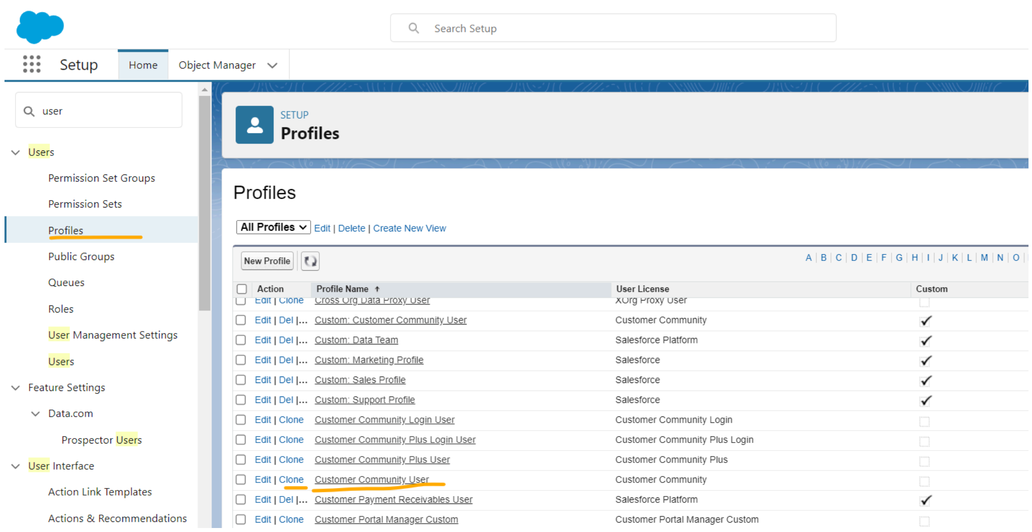


13.4.6.2. Click ‘Publish’

Create profile for customer portal users

(🕰️ 10 mins)

14. Using std. Profile , clone and create a unique profile for customer portal users. This way we can apply security for portal users
    14.1. Click on Setup
    14.2. Search for ‘Profiles’ in quick find
    14.3. Look for profile with the name ‘Customer Community User’ >> Click on Clone option



    14.4. Provide new profile name as ‘Custom: Customer Community User’
    14.5. Click on Save

Enable Knowledge Article Access to Users (🕰️ 10 mins)

15. Access to knowledge articles are given at profile level in 2 steps

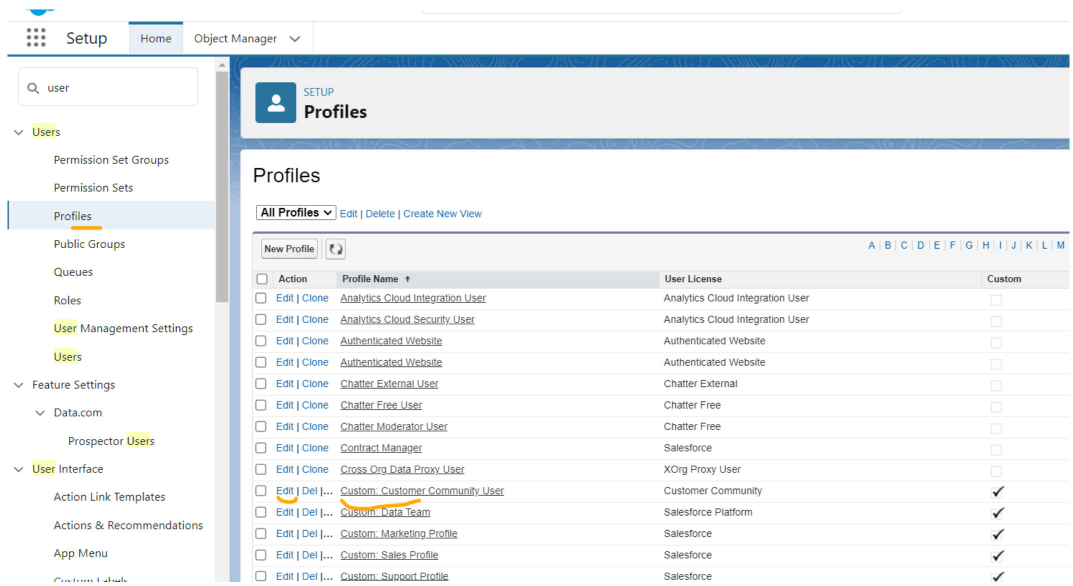
15.1. Enable access to “Knowledge” object that holds all knowledge articles

15.1.1. Click on Setup

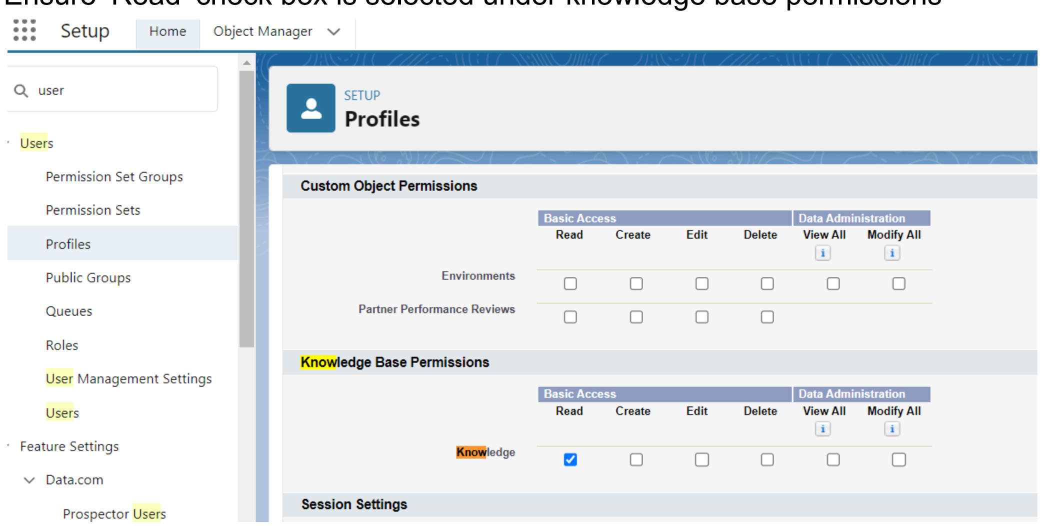
15.1.2. Search for ‘Profiles’ in quick find

15.1.3. Look for profile with the name ‘Custom: Customer Community User’

15.1.4. Click on Profile Name > Edit



15.1.5. Ensure ‘Read’ check box is selected under knowledge base permissions



15.1.6. Scroll up and click on Save

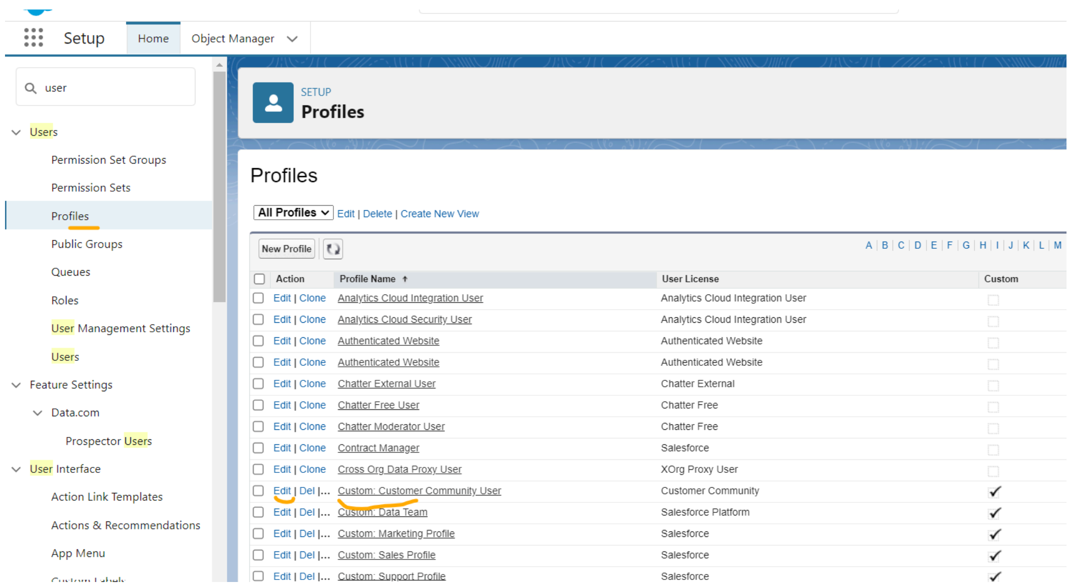
15.2. Enable access to “Data Category”

15.2.1. Click on Setup

15.2.2. Search for ‘Profiles’ in quick find

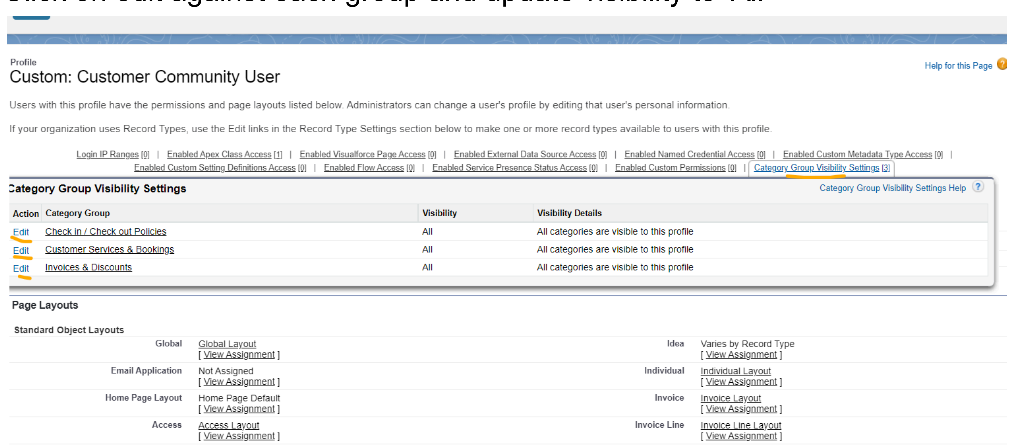
15.2.3. Look for profile with the name ‘Custom: Customer Community User’

15.2.4. Click on Profile Name



15.2.5. Click on ‘Category Group Visibility Settings’

15.2.5.1. Click on edit against each group and update visibility to ‘All’

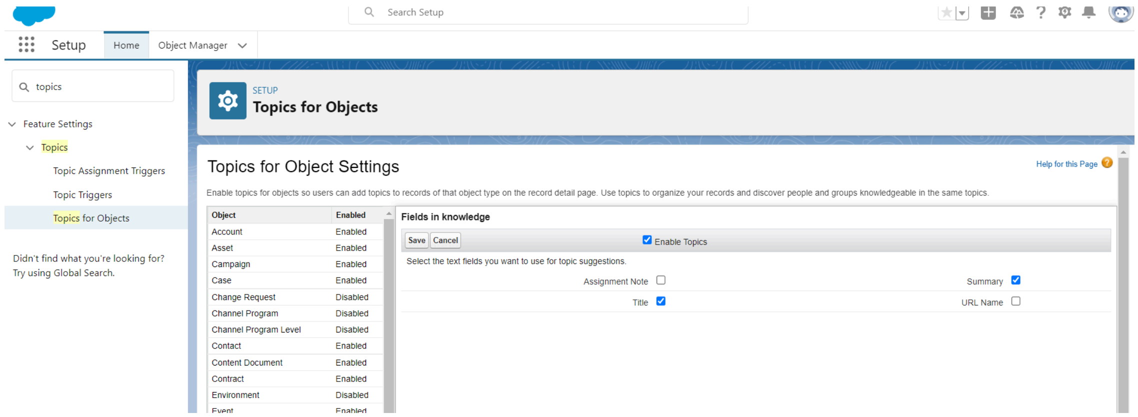


Configure knowledge articles to display in customer portal (🕰️ 20 mins)

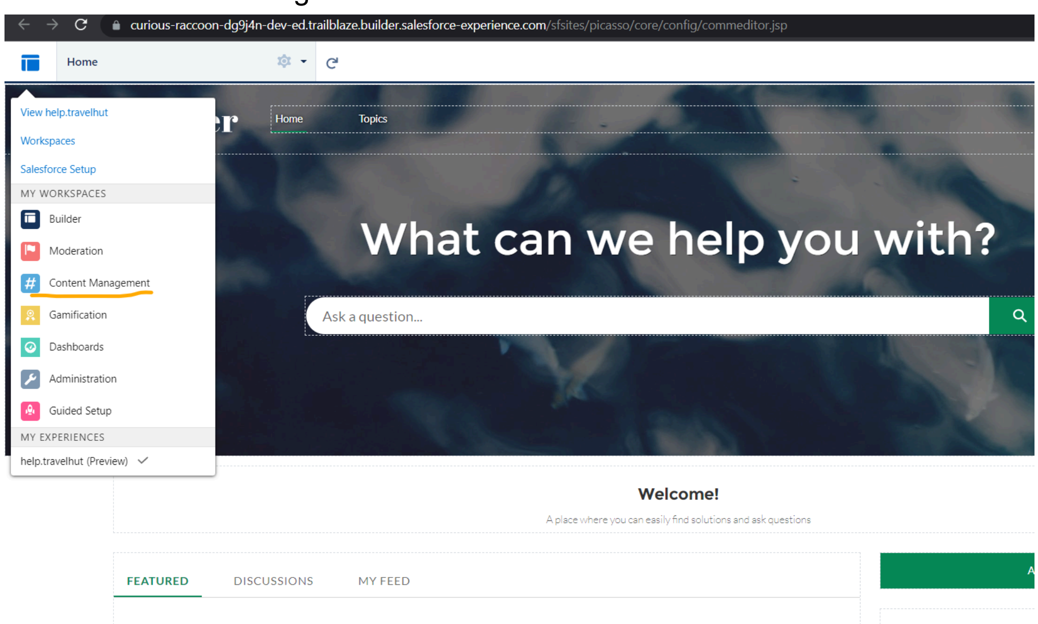
16. Click on Setup

16.1. Search for ‘Topics for object’ and Enable Topics as below and Save

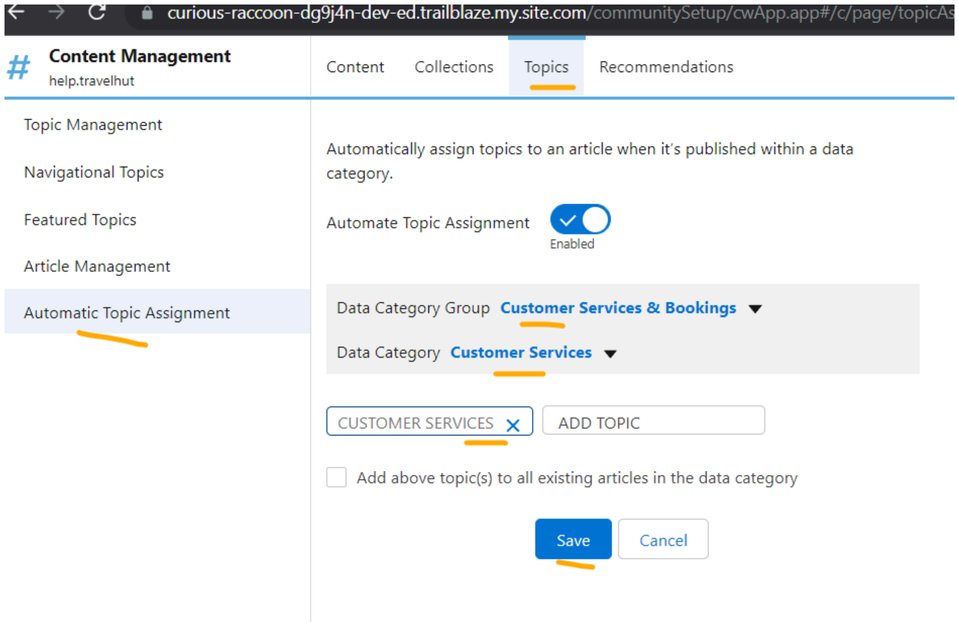
De

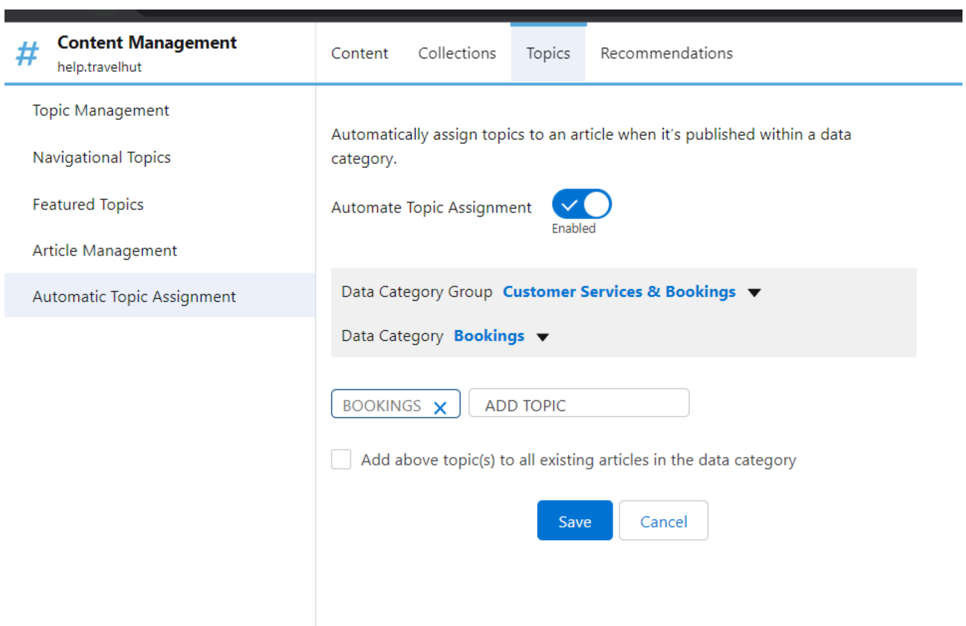


17. Click on Setup
    17.1. Search for ‘sites‘ in Quick find text box
    17.2. Click on “All sites” under Digital Experience
    17.3. You will see the site created in list of all sites
        17.3.1. Click on ‘Builder’
    17.4. Website will open in a configuration mode like below
    17.5. Choose Content Management



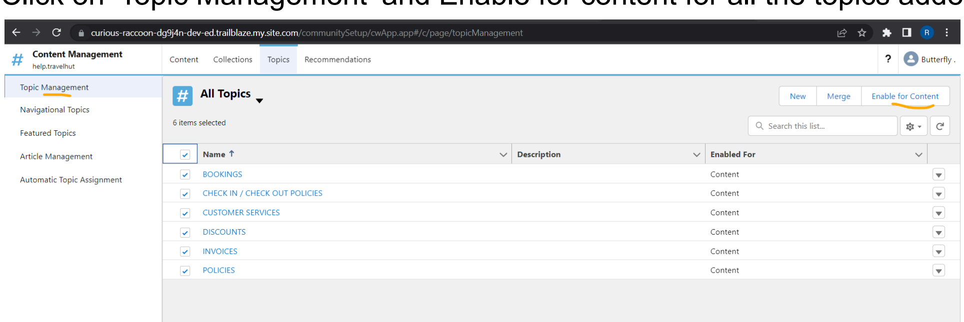
    17.6. Choose Content Management > Topics > Automatic Topic Assignment
        17.6.1. Choose Data Category Group
        17.6.2. Choose Data Category
        17.6.3. Add as many topics as we need and save



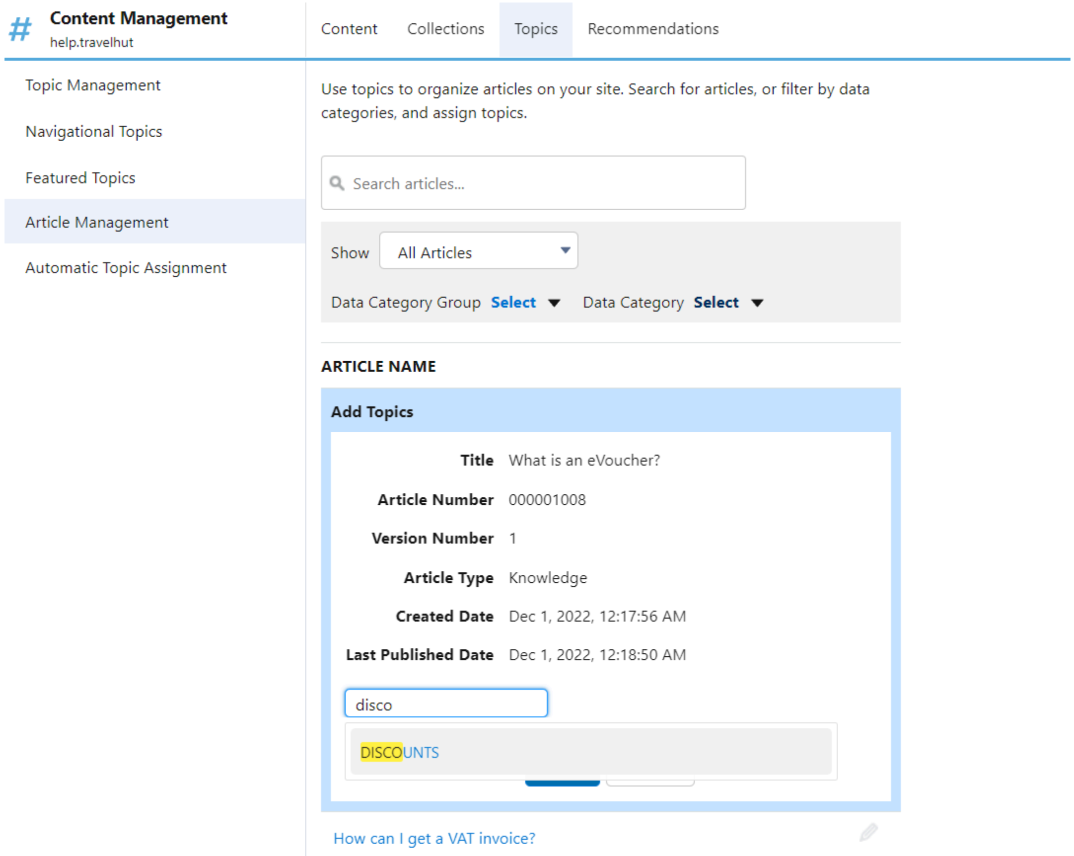


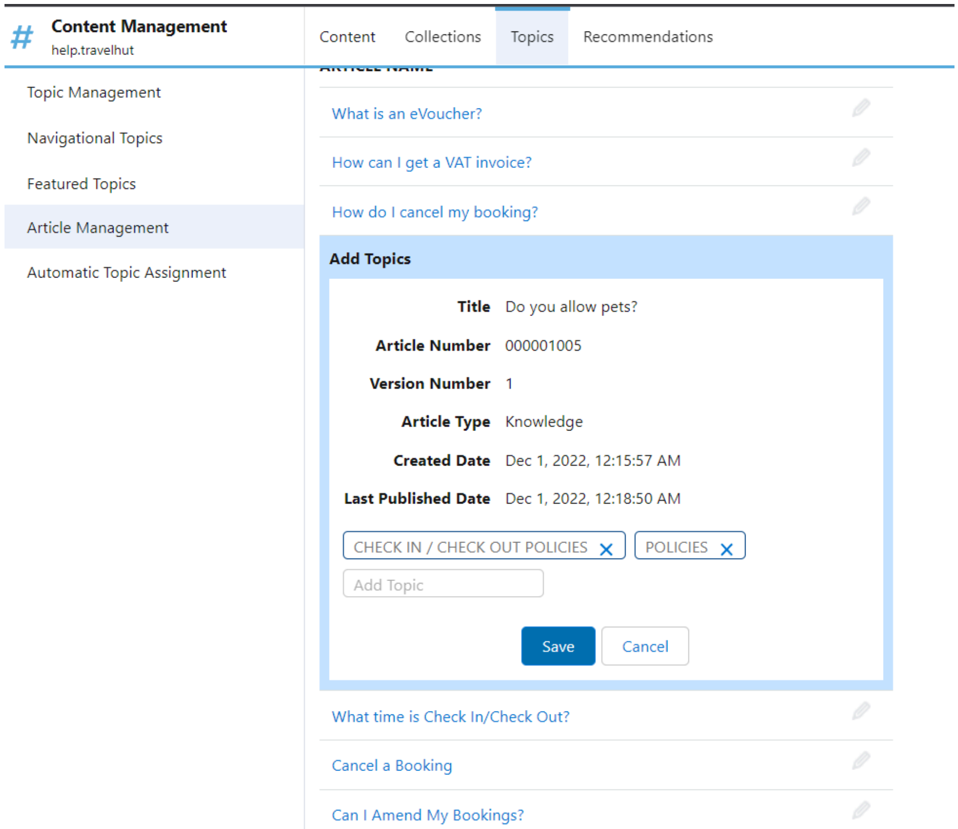
17.7. Repeat the above steps for all Data category group and assign topics

17.8. Click on 'Topic Management' and Enable for content for all the topics added



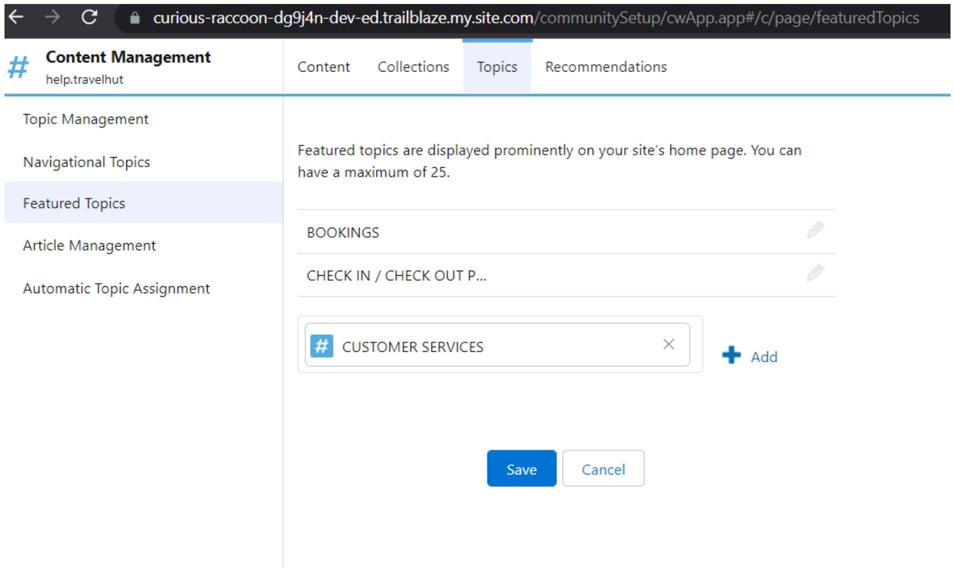
17.9. In ‘Article Management’, for each knowledge article > Click on pencil icon & assign one or more topics > Click on Save



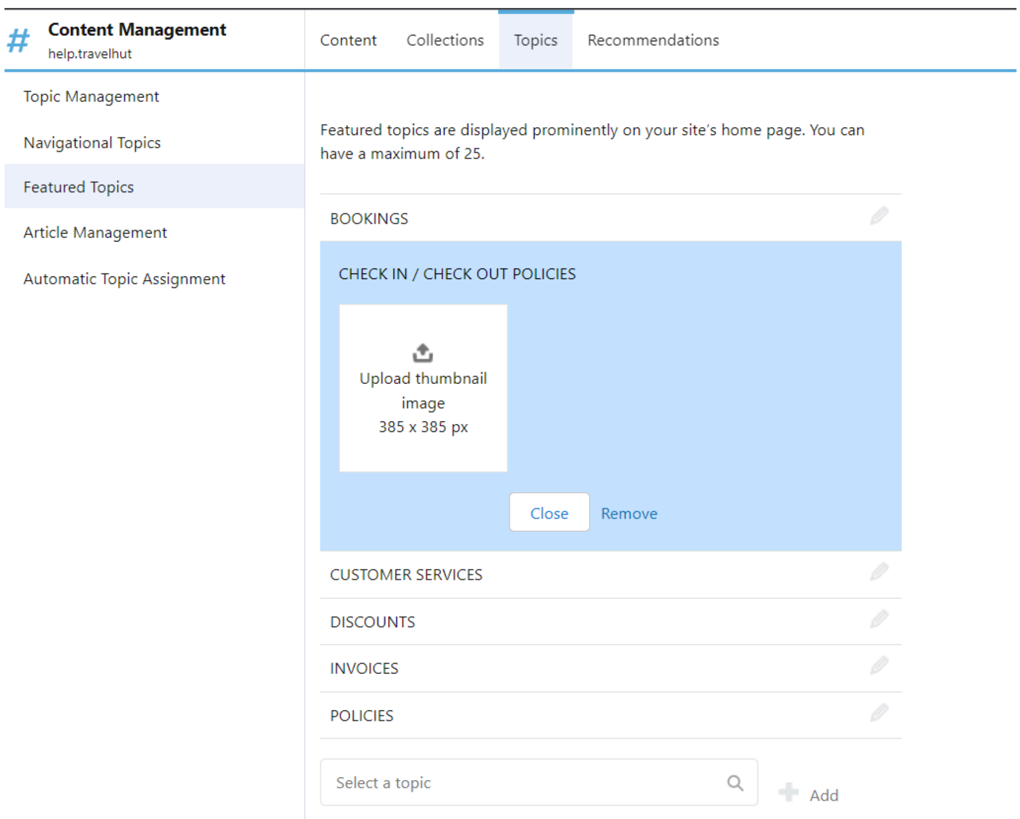


Configure Featured Topics to display in customer portal (🕰️ 10 mins)

18. Under Content Management
    18.1. Choose ‘Featured Topics’ and add topics that should be listed on the home page

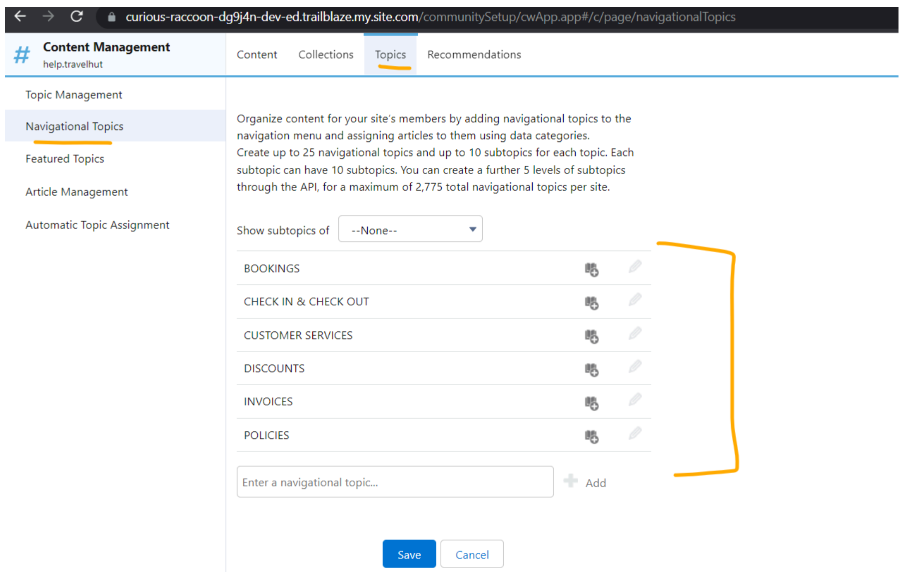


18.2. Once featured topics have been added, it can further be customized by uploading a picture



Configure Navigational Topics to display in customer portal (🕰️ 5 mins)

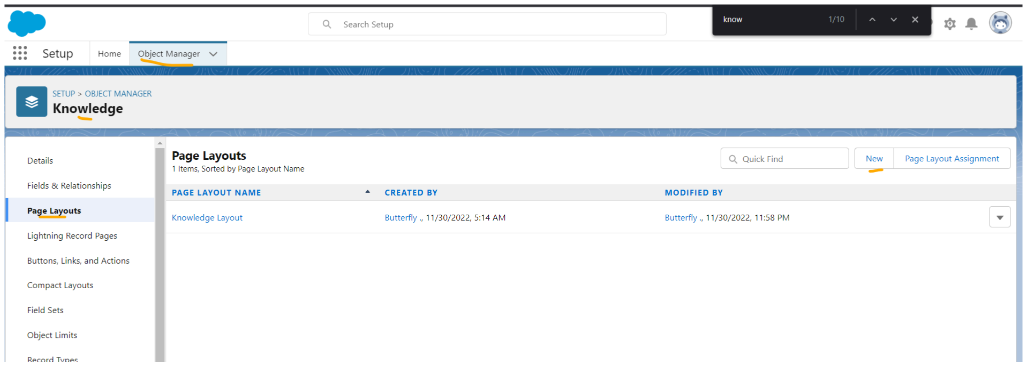
19. Under Content Management
    19.1. Choose 'Navigational Topics' and add topics that should be listed on the home page



Configure new knowledge article page for guest and customers (🕰️ 15 mins)

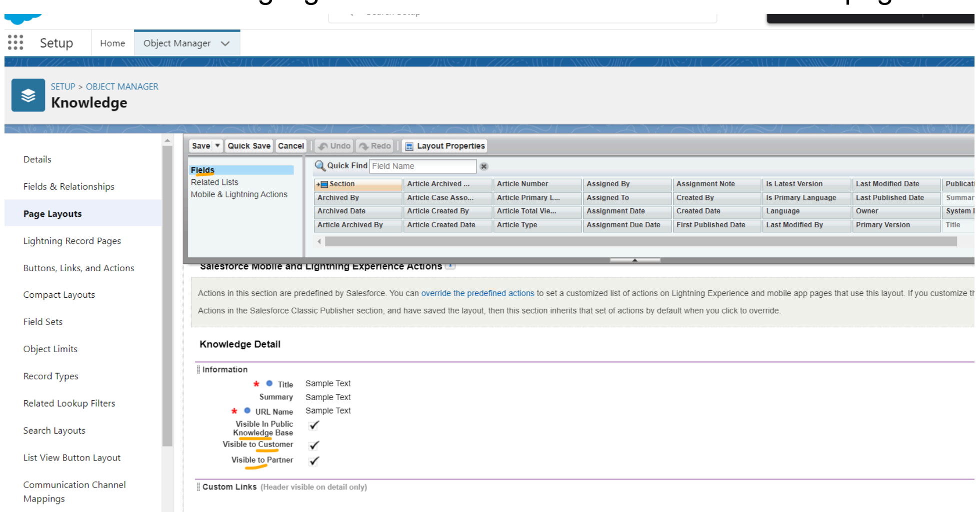
Once knowledge articles are added, we should create a specific page with the fields that we would like customer portal user (customers & guest)

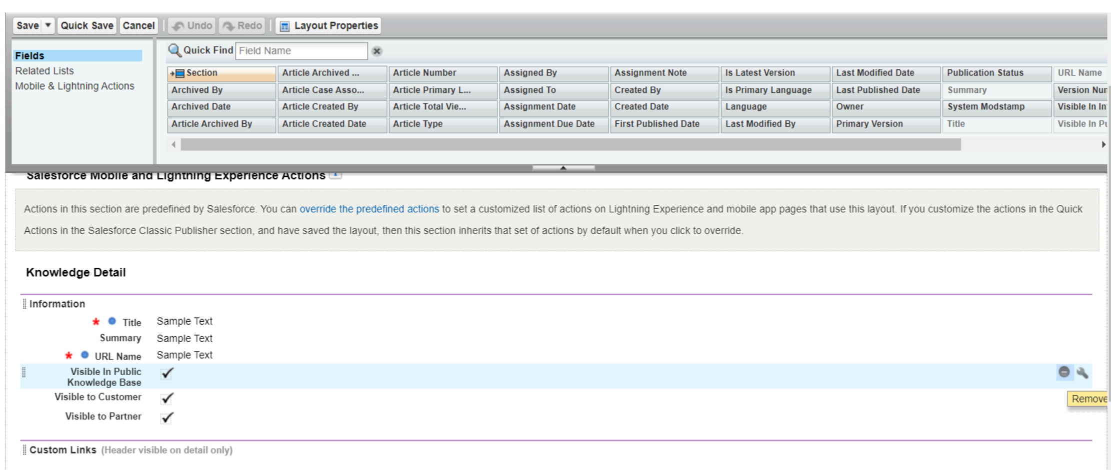
20. Click on Setup
    20.1. Click on "Object Manager"
    20.2. Search for 'Knowledge'' in Quick find text box
    20.3. Click on Page layout > New button



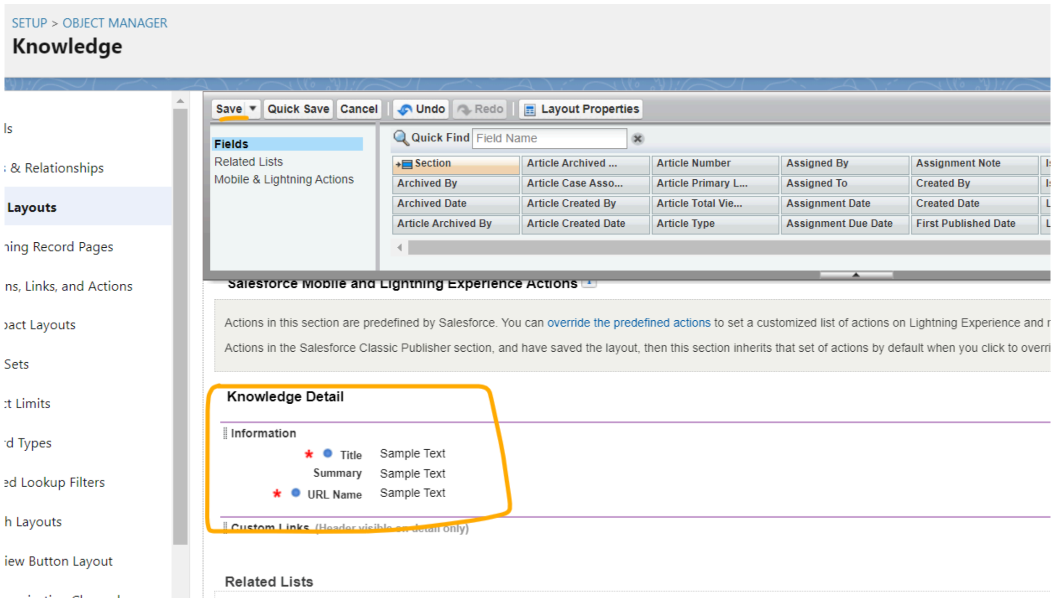
20.4. Provide new layout name as ‘Knowledge Layout - Community User’

20.5. Ensure the below highlighted fields have been removed from the page



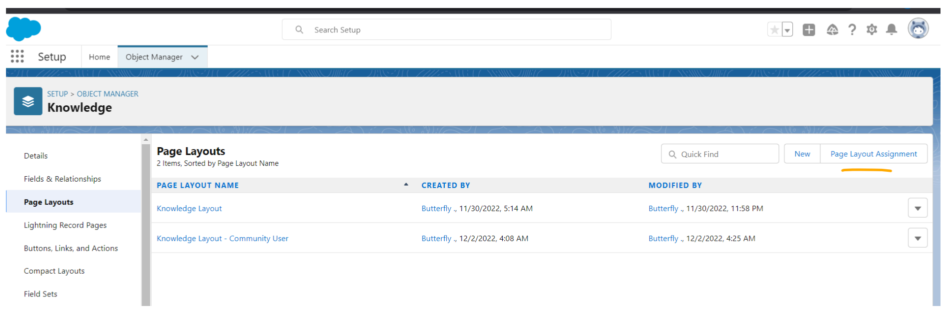


20.6. Once fields are removed, scroll up > Click Save

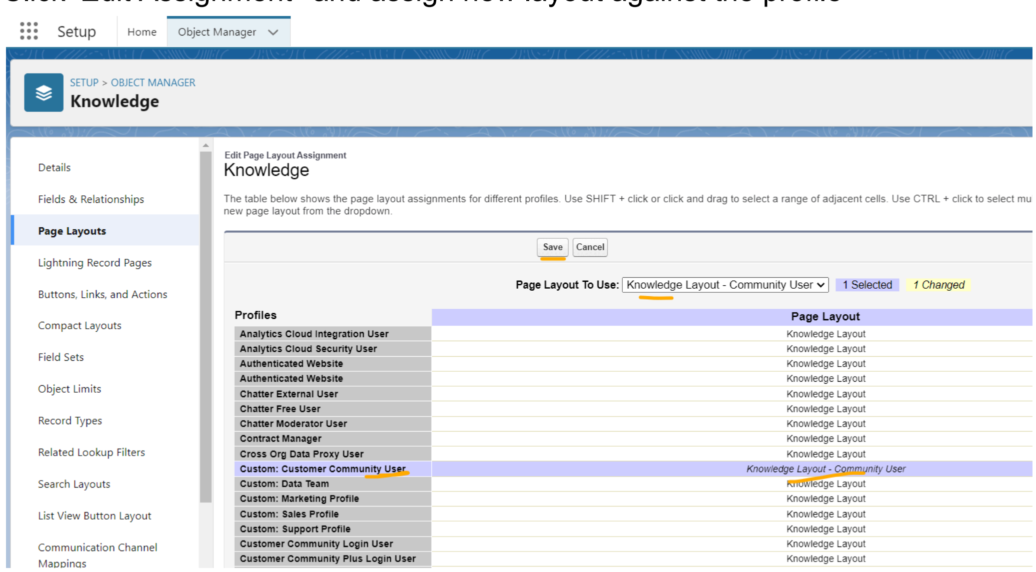


20.7. Enable new page layout created for customers / portal users / authenticated users

20.7.1. Click on ‘Page Layout Assignment’



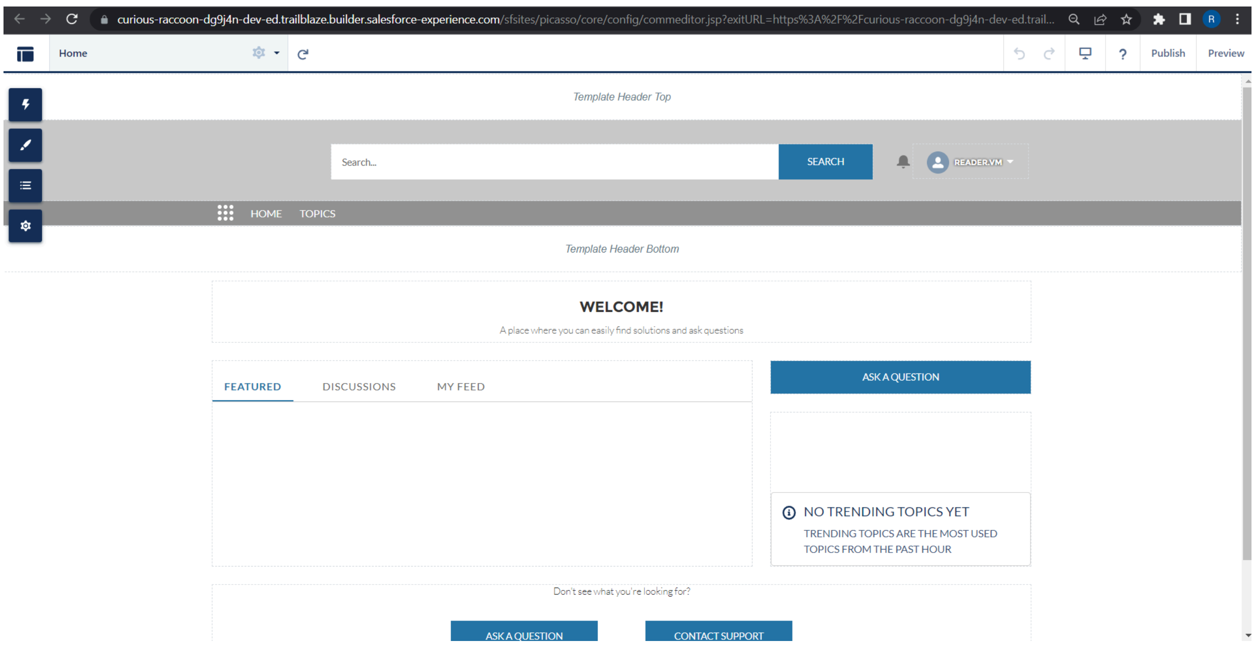
20.7.2. Click ‘Edit Assignment’’ and assign new layout against the profile



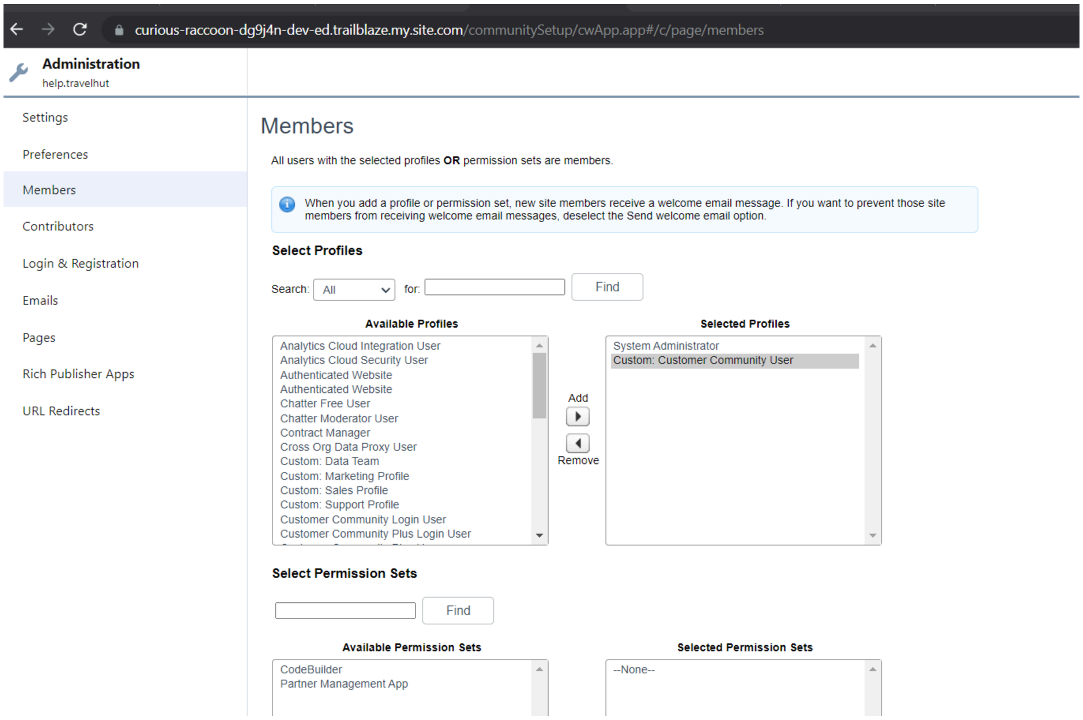
20.7.3. Click on ‘Save’

Enable profile members that can access customer portal (🕰️ 10 mins)

21. Click on Setup
    21.1. Search for ‘sites‘ in Quick find text box
    21.2. Click on “All sites” under Digital Experience
    21.3. You will see the site created in list of all sites
        21.3.1. Click on ‘Builder’
    21.4. Website will open in a configuration mode like below

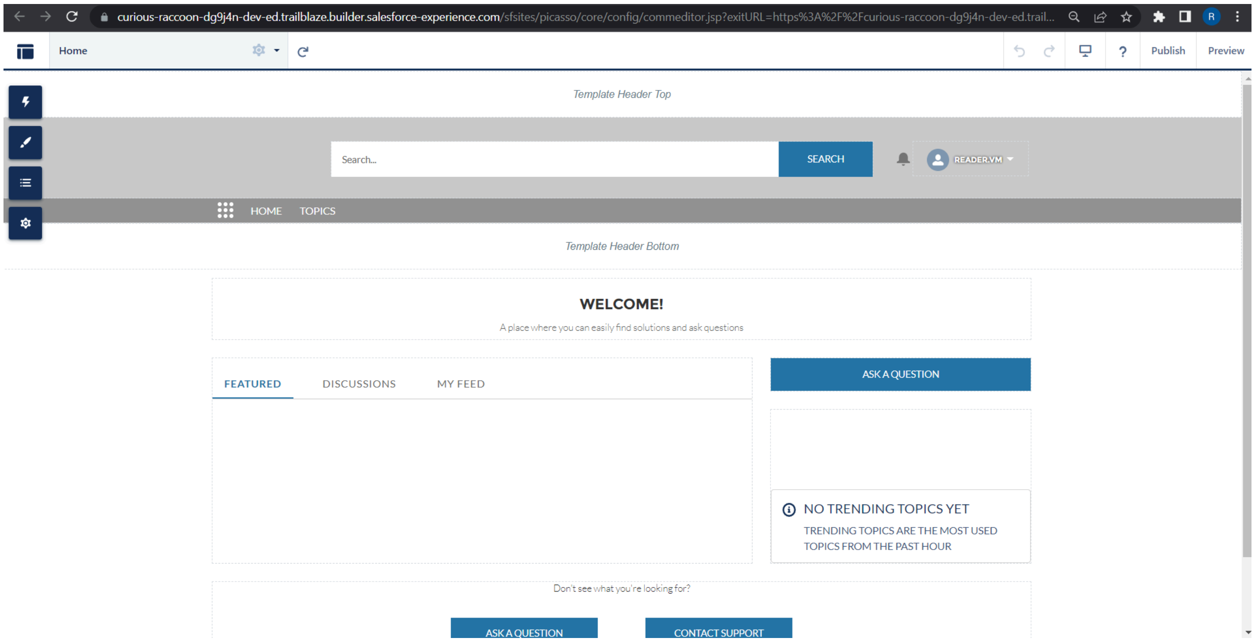


    21.5. Open “Members” option on the left panel
        21.5.1. Add Custom:Customer Community User as below & Save



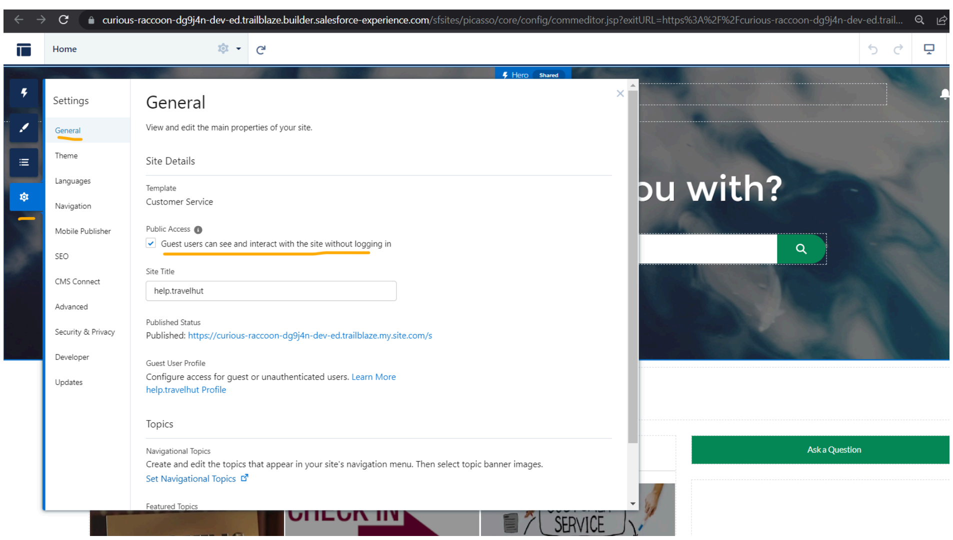
Enable customer portal for guest / unauthenticated users (🕰️ 15 mins)

22. Click on Setup
    22.1. Search for ‘sites‘ in Quick find text box
    22.2. Click on “All sites” under Digital Experience
    22.3. You will see the site created in list of all sites
        22.3.1. Click on ‘Builder’
    22.4. Website will open in a configuration mode like below

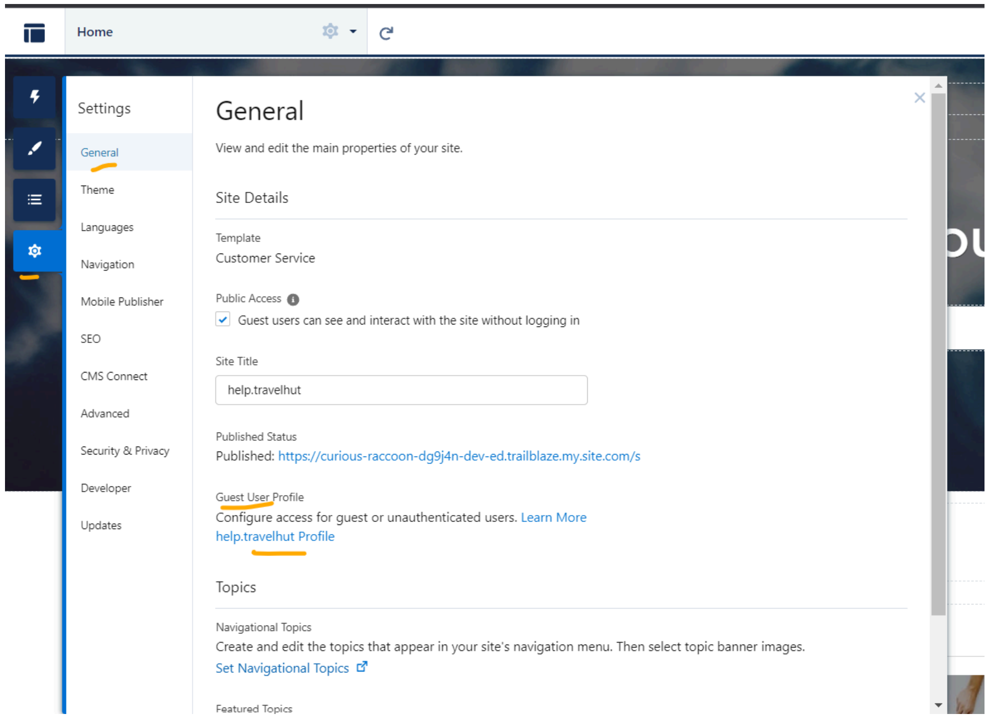


22.5. Open "Settings" option on the left panel

22.5.1. Enable guest users checkbox as below



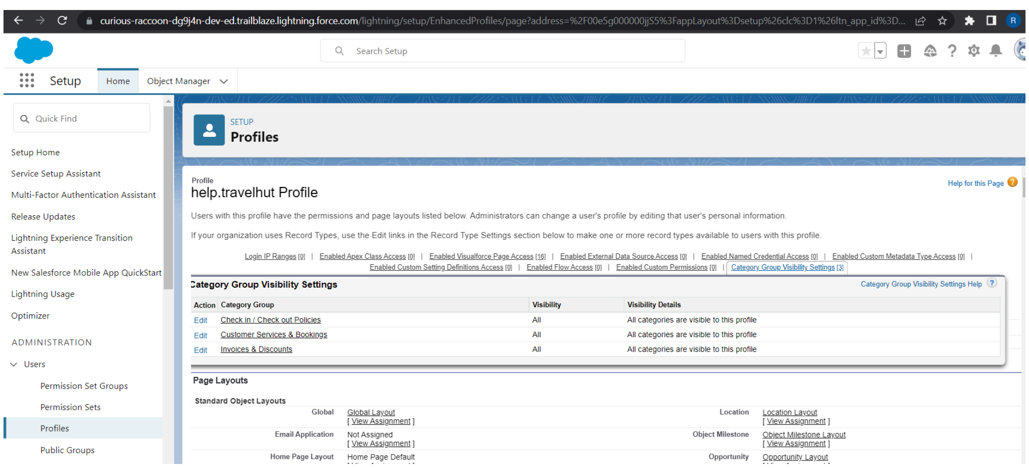
22.6. Under 'Guest User Profile'' > Click on Profile link



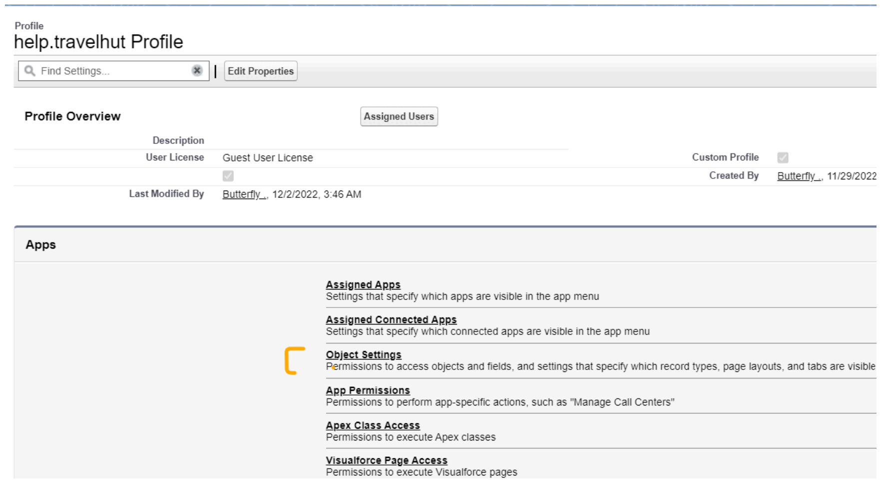
22.6.1. On the profile page,

22.6.1.1. Click on 'Category Group Visibility Settings'

22.6.1.2. Edit each data category and is update as below

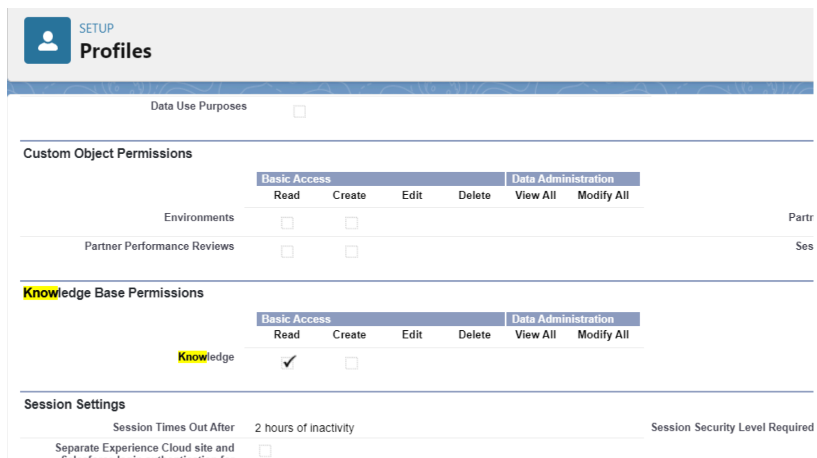


22.6.2. On the profile page, choose object settings



22.6.2.1. Choose ‘Knowledge’ from the table and Scroll up and click on edit

22.6.2.2. Ensure “knowledge” object has been given read access & Save



22.6.2.3. Choose Cases’ from the table and Scroll up and click on edit

22.6.2.4. Ensure “Cases” object has been given read access & Save

22.6.3. On the profile page,

22.7. Preview your changes

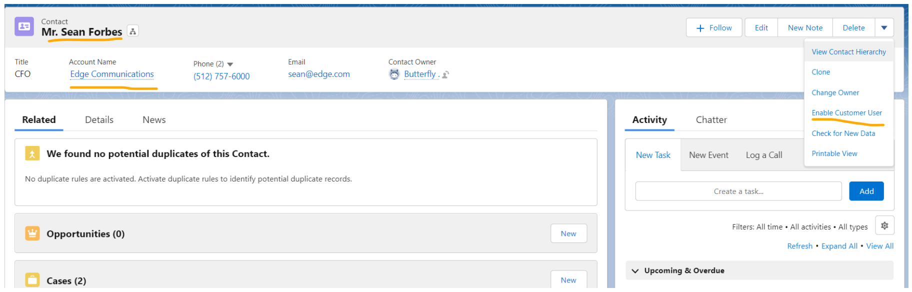
22.8. Publish your changes

Enable Guest Users to submit cases

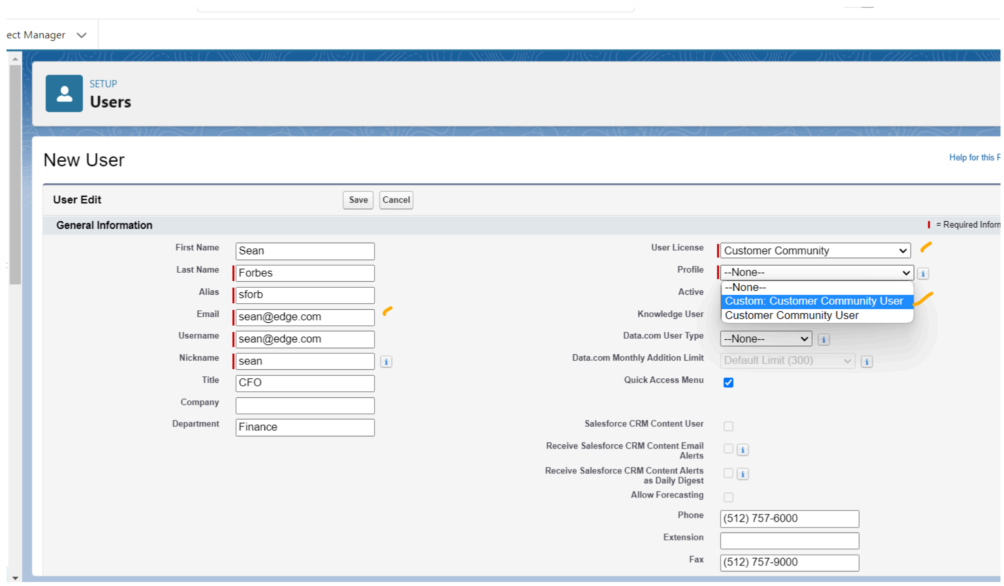
23. In Lightning Experience
    23.1. Click the gear icon, then click Setup.
    23.2. Enter Digital Experiences in the Quick Find box, then click on All Sites.
    23.3. Click Workspaces next to the site in which you want your Guest Users to log Cases via 'Contact Support.'
    23.4. From the Experience Workspaces page, click on Administration.
    23.5. Click on Pages.
    23.6. Click on Go to Force.com.
    23.7. On the 'Sites Detail' section, click Edit.
    23.8. Select Guest Access to the Support API.
    23.9. Add 'NewCase', or a custom quick action to add Cases, to the 'Selected Quick Actions.'
    23.10. Click on Save

Create sample customer and test (🕰️ 15 mins)

24. Click on App launcher > Accounts
25. Create a new account and a contact
    25.1. Ensure you have provided a valid contact email
    25.2. Get into contact record and enable customer user as below



25.3. Once you are redirected to the user record screen, ensure license and profile are mapped as below

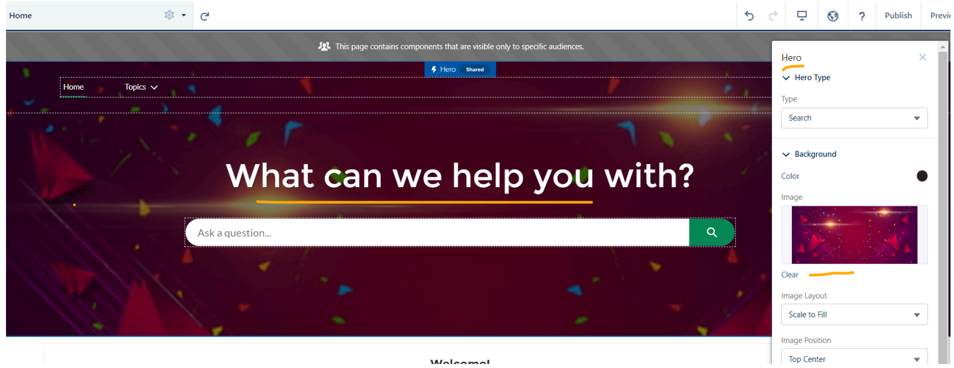


25.4. System will send email to the email address given in the user record. Use the link and set the password for login

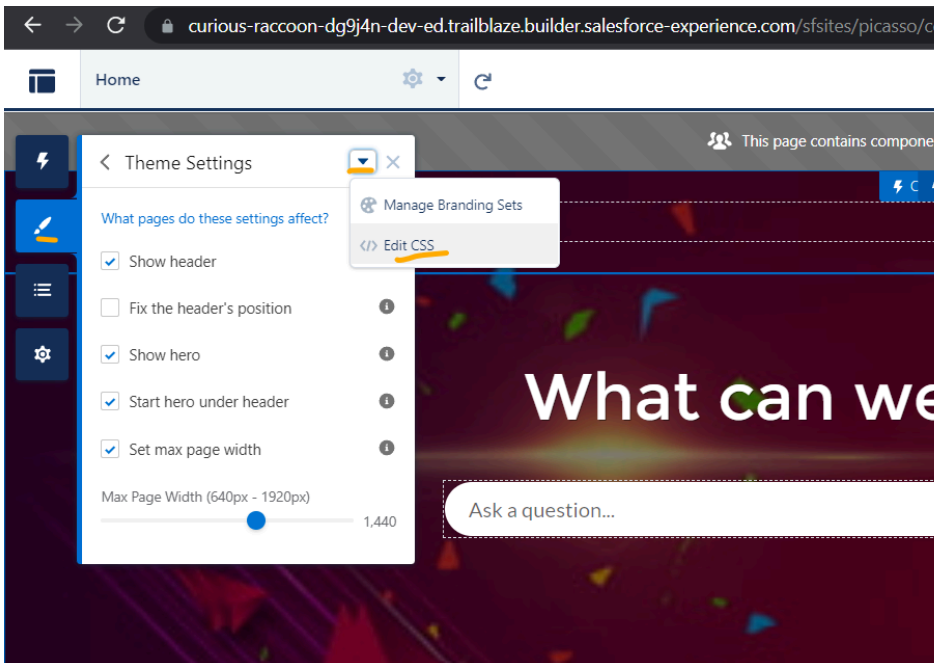
Style your website (🕰️ 15 mins)

26. Use existing components and feel free to change the look and feel of website

26.1. Change Banner image by configuring hero component



26.2. Hide webster layout title



26.3. Update Search component as below to show relevant FAQs or Articles