

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

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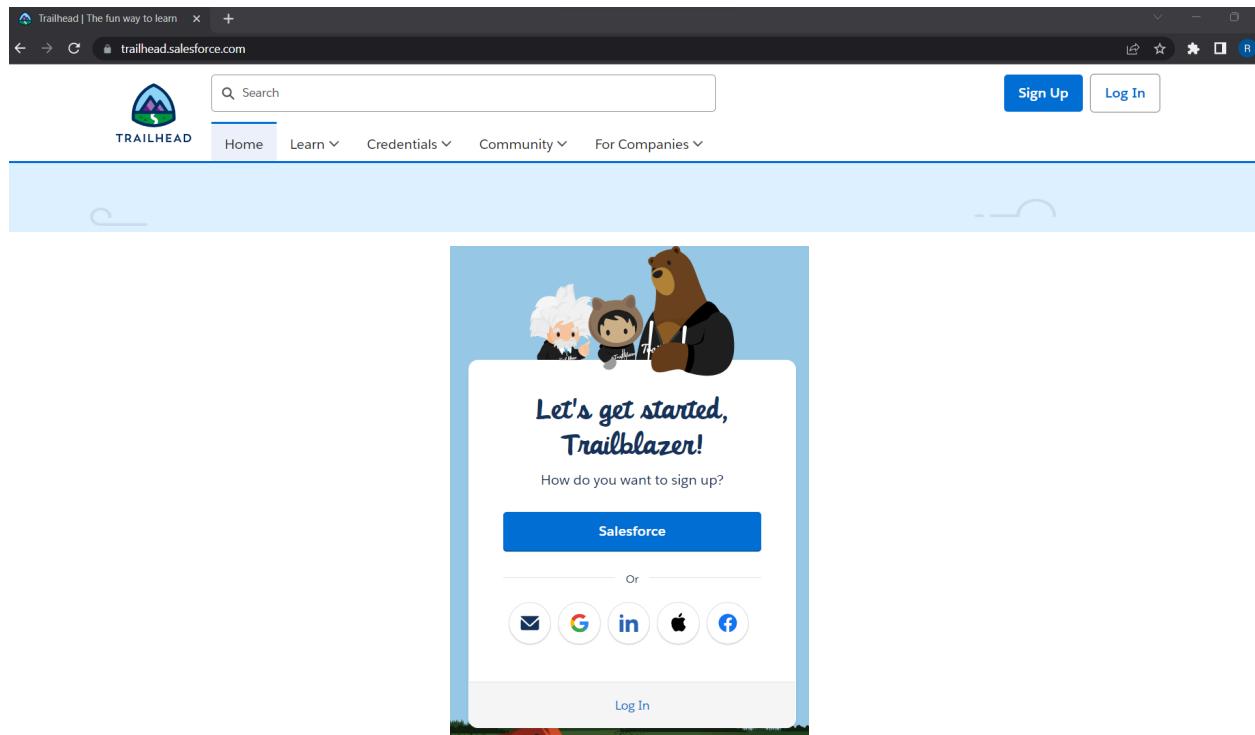
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Environment Setup - Pre Work (⌚ 15 mins)

— 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

A screenshot of the Trailhead website at trailhead.salesforce.com/today. The top navigation bar includes links for Today, Learn, Credentials, Community, and For Companies. A search bar is also present. On the right side, a user profile is shown with the name "Butterfly .", title "Expeditioner", 56 badges, and 50,050 points. A purple circle with a white letter "B" highlights the profile picture. A blue callout box is overlaid on the profile area, listing "Profile", "Settings", "Favorites", "Hands-On Orgs" (which is underlined in blue), and "Log Out".

3. Create a new playground,
- Click on “Create Playground”
 - Leave default name as is
 - Click create

A screenshot of the Trailhead "Hands-On Orgs" page. The top navigation bar is identical to the main site. Below it, a header says "Hands-On Orgs" with "Create Playground" and "Connect Org" buttons. A central modal window titled "Create Playground" asks for a name, with a placeholder "Creative Impala Playground". At the bottom of the modal are "Cancel" and "Create" buttons.



Wait for the playground / environment to get created

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

Connected Orgs (7)

Launch, rename, or disconnect the orgs you use for hands-on challenges. Learn about managing your hands-on org in the [Trailhead Playground Management](#) module.

The screenshot shows a list of connected orgs. The first item is "Curious Bear Playground". It has a "LAST USED" timestamp. Below it are details: Username (curious-raccoon-dg9j4n.com), Type (Trailhead Playground), Created (10/31/2022), and Last Activity (Created on 10/31/2022). To the right of the org entry are three buttons: "Rename", "Disconnect", and "Launch". The "Launch" button is highlighted with a yellow underline.

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



The screenshot shows the Salesforce Setup interface. In the top left, there's a blue cloud icon. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar at the top right contains the placeholder 'Search Setup'. On the left, a sidebar has a search field with 'digi' typed in. Below it, under 'Feature Settings', is a section for 'Digital Experiences'. A message at the bottom of the sidebar says 'Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'SETUP Settings' with a gear icon. It has a header 'Experiences' and a sub-header 'Build pixel-perfect websites, portals, communities, and forums with Experience Cloud. [Learn More](#)'. Below this, a note says 'To get started with digital experiences, you must first enable it and select a domain. If enhanced domains are enabled, your org's My Domain name is the subdomain by default.' There are two 'Save' buttons at the bottom of the page.

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

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 you 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) by Salesforce Enhanced

Healthcare is a leading provider of health and wellness products and technology. Oneclick adjusting site. Vivamus aenean ex portas, vel tempus lectus imperdiet at.

Stay in the Loop

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) by Salesforce Enhanced

Unparalleled Performance

Unparalleled Performance • Standards-Based Customization • Develop blazing fast digital experiences, such as websites, microsites, and portals, using the Lightning Web...

B2C Commerce by Salesforce New

Organic bars, gels, and mixes

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

Pay Bills Send Money Transfer Money Message My Address

Customer Service by Salesforce

Welcome to the Acme Climbing Community!

curious-raccoon-dg9j4n-dev-ed.trailblaze.builder.salesforce-experience.com/sfsites/picasso/core/config/wizard.jsp

Back Help & Training

salesforce

Enter a Name

Not sure what to enter? Don't worry—you can always change it later.

Name:

URL: curious-raccoon-dg9j4n-dev-ed.trailblaze.my.sit... optional

Create

Welcome to the Acme Climbing Community!
A place where you can easily find articles and ask questions.

Ask a Question

Training Articles

Leaderboard

FAQs

Community

Feedback

Help

Contact Support



Wait for the site to get created like the below one

curious-raccoon-dg9j4n-dev-ed.trailblaze.my.site.com/communitySetup/cwApp.app#/c/home?isNew=1

Workspaces help.travelhut

help.travelhut (Preview - Unpublished)

See your favorite metrics right here by getting the latest AppExchange package. [Install AppExchange Package](#)

My Workspaces

Builder
Build, brand, and customize your site's pages.

Moderation
Monitor posts and comments, create rules.

Content Management
Organize, manage, and build collections for your Experience Cloud site.

Gamification
Keep your members engaged with recognition badges.

Dashboards
Examine the health of your site with reports and dashboards and engage with members.

Administration
Configure settings and properties for your experience.

Quick Links

Experience Pulse Metrics

Lightning Carousel and Banner Components

Trailblazer Community: Experience Cloud

Set Up and Manage Experience Cloud

AppExchange

Expand Your Reach with Communities [START LEARNING >](#)

'23 Salesforce Win

Experience Pulse Metrics

Lightning Carousel and Banner Components

Trailblazer Community: Experience Cloud

Set Up and Manage Experience Cloud

AppExchange

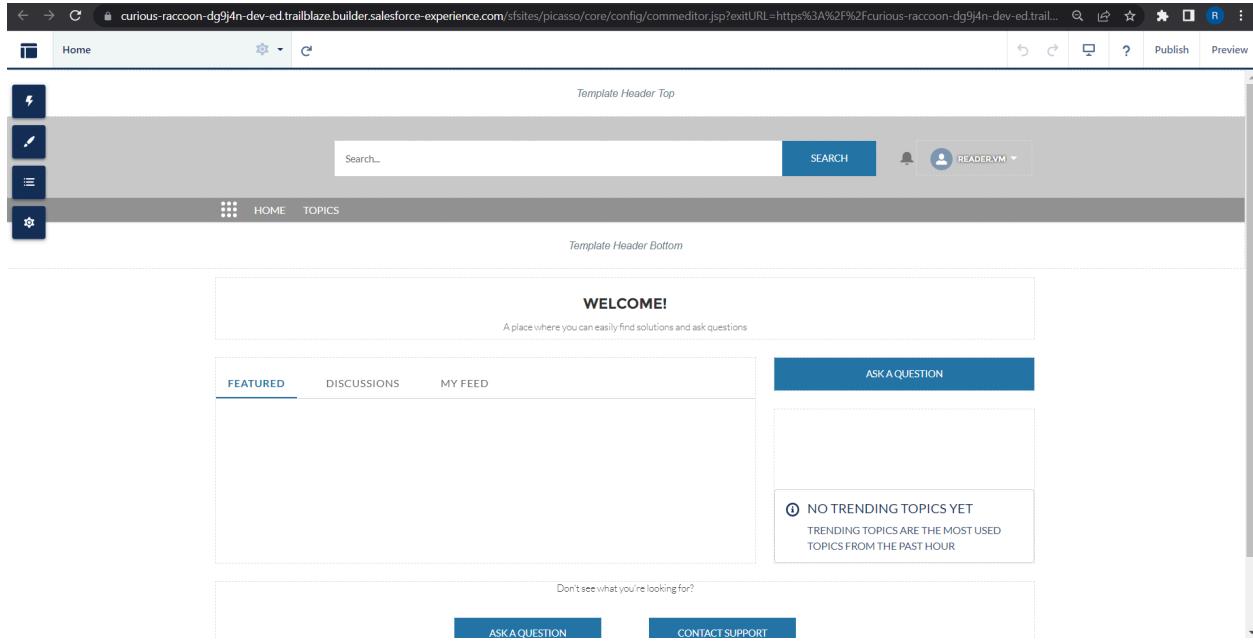
Expand Your Reach with Communities [START LEARNING >](#)

'23 Salesforce Win

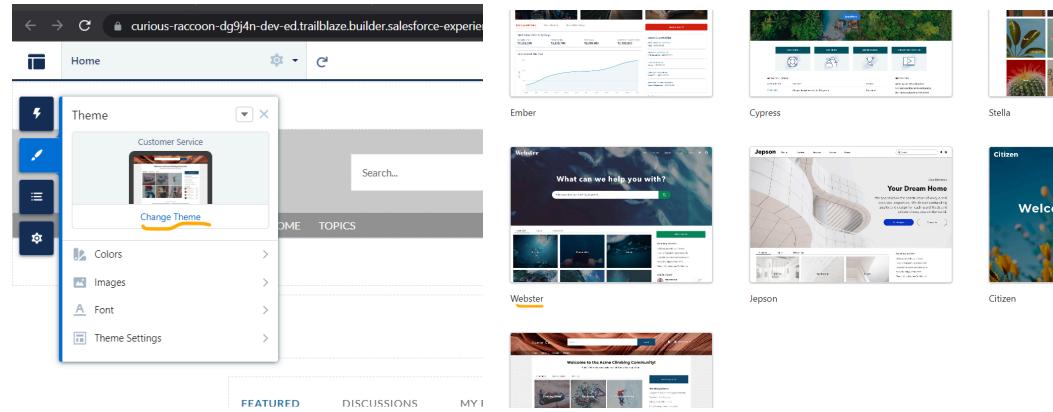
Customize your customer portal (5 mins)

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"

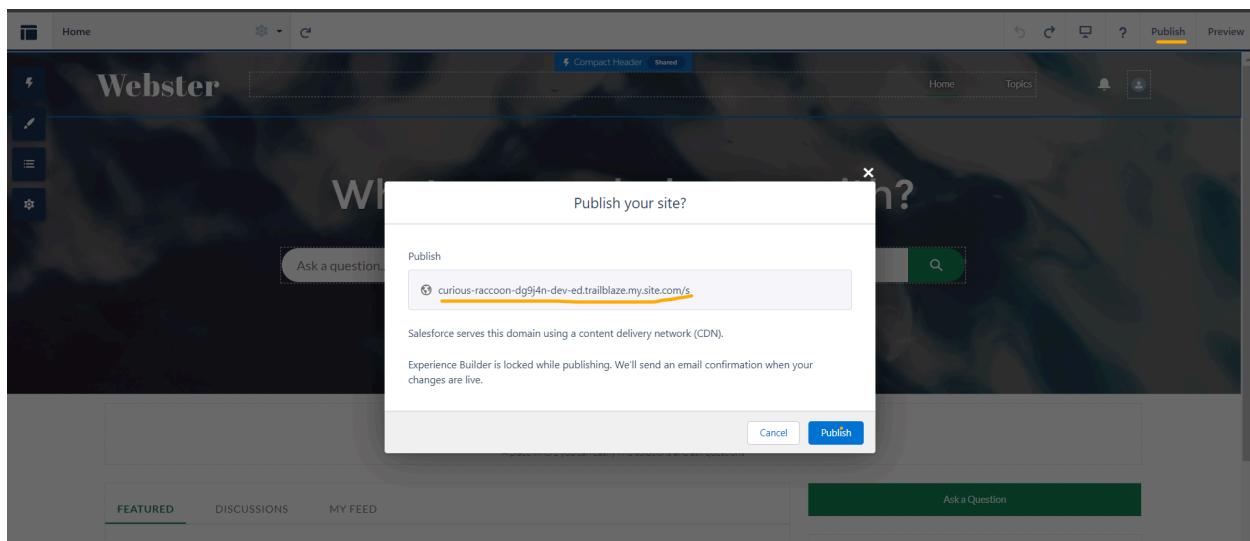


7. Preview your changes



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

The screenshot shows the Salesforce Setup interface with the 'Users' page open. The left sidebar shows 'Users' selected. The main area displays a table of users, with one row selected for 'Butterfly'. In the profile section of the selected user's detail view, the 'Knowledge User' checkbox is checked.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Butterfly	B	reader.vm@curious-raccoon-dg9j4n.com		<input checked="" type="checkbox"/>	System Administrator

User
Butterfly .

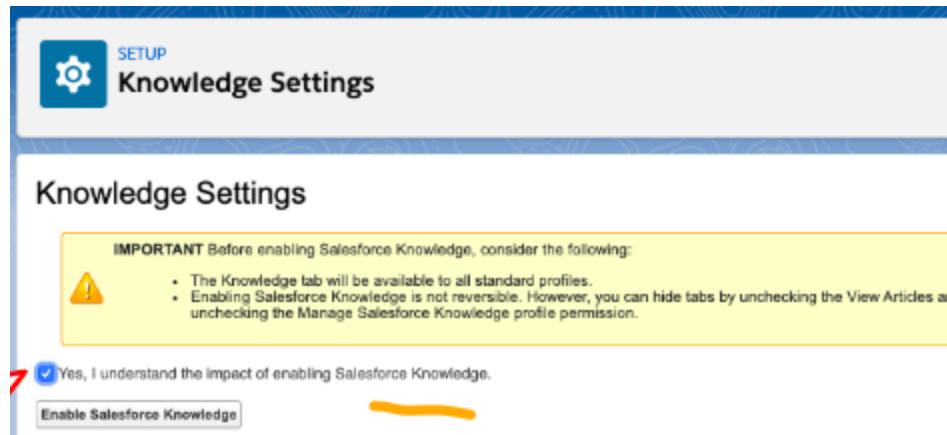
Permission Set Assignments [0] | Permission Set Assignments: Activation Required [0] | Permission Set Group Assignments [0] | Permission Set License Assignments [1] | Personal Groups [0] | Public Groups [0] | Team [0] | Managers in the Role Hierarchy [0] | OAuth Connected Apps [3] | Third-Party Account Links [0] | Installed Mobile Apps [0] | Authentication Settings for External Systems [0] | Login History [0]

Managers in the Role Hierarchy

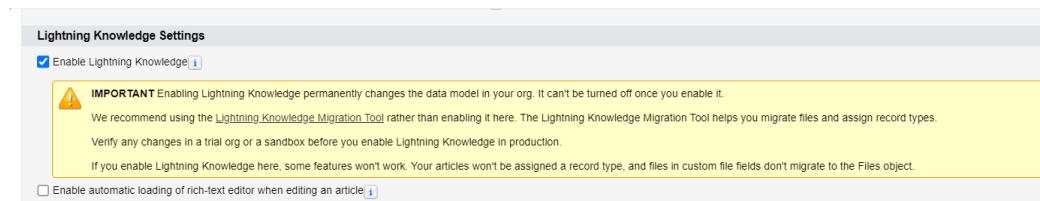
No records to display

Alias	Email	Username	Nickname	Title	Company	Department	Division	User License	Profile	Active	Marketing User	Offline User	Knowledge User	Flow User	Service Cloud User
B	reader.vm@gmail.com	reader.vm@curious-raccoon-dg9j4n.com	reader.vm		HCL Technologies			Salesforce	System Administrator	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="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

Knowledge One

To learn more about Knowledge One, see the [\[online help\]](#).

Highlight relevant article text within search results [i](#)

Autocomplete keyword search [i](#)

Autocomplete title search [i](#)

Suggest related articles on cases [i](#)

Case Fields Used to Find Suggested Articles

Available Case Fields	Selected Case Fields
Created By Alias	Subject
Email Address	Case Number
Engineering Req Number	Case Origin
Internal Comments	Case Reason
Last Modified By Alias	Case Type
Milestone Status	Company
Milestone Status Icon	Contact Email
Name	Contact Fax
Phone	Contact Mobile
Potential Liability	Contact Phone
Priority	
Product	
SLA Violation	
Status	

Add [▶](#) Remove [◀](#)

Top [↑](#) Up [▲](#) Down [▼](#) Bottom [↓](#)

[Knowledge Settings](#)

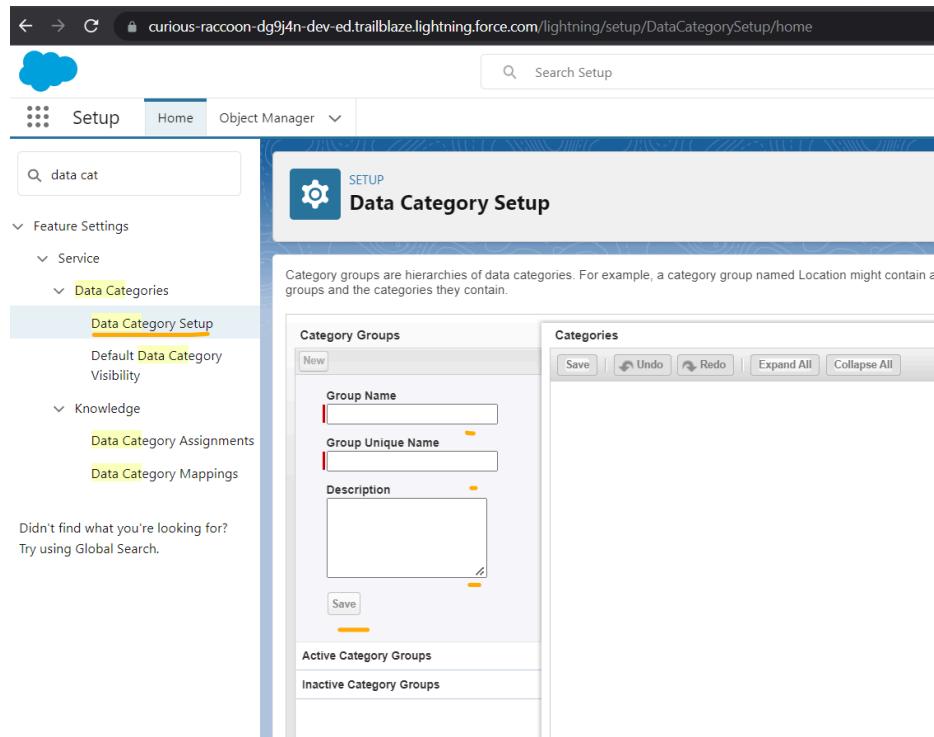
10.8. Scroll up and click on Save

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	<ol style="list-style-type: none">1. Customer Service2. 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

The screenshot shows the 'Data Category Setup' page under the 'SETUP' tab. On the left, there's a sidebar with 'Category Groups' and 'New'. Below it are sections for 'Active Category Groups' and 'Inactive Category Groups'. The 'Customer Services & Bookings' group is selected and highlighted in blue. In the main panel, titled 'Categories in Customer Services & Bookings', there are buttons for 'Save', 'Undo', 'Redo', 'Expand All', and 'Collapse All'. A context menu is open over the 'Customer Services & Bookings' group, with options like 'Add Child Category' (highlighted in yellow), 'Edit Category', and 'Order Child Categories Alphabetically'.

Data Categories

Category groups are hierarchies of data categories. For example, a category group named Location might contain a geographical hierarchy of continents, countries, regions and the categories they contain.

This screenshot shows the same 'Data Category Setup' interface after a new category has been added. The 'Customer Services & Bookings' group now has a child category, 'Bookings', which is also highlighted in blue. The 'Actions' menu is still open, showing the 'Add Child Category' option.

11.5. Click on Save

11.6. Activate each category groups

The screenshot shows the 'Data Categories' interface. On the left, there's a sidebar with 'Category Groups' and tabs for 'New', 'Active Category Groups', and 'Inactive Category Groups'. Under 'Active Category Groups', 'Customer Services & Bookings' is selected and highlighted with a yellow bar at the bottom. On the right, there's a 'Categories in Invoices & Discounts' panel with a toolbar for 'Save', 'Undo', 'Redo', 'Expand All', and 'Collapse All'. It shows a tree structure with 'All' expanded, showing 'Invoices' and 'Discounts'. A yellow box highlights the 'Activate Category Group' button next to the 'Invoices' node.

11.7. Final list of active data category groups

Data Categories

Category groups are hierarchies of data categories. For example, a category group named Location might contain a geographical hierarchy of cities, states, and countries, along with the data categories they contain.

This screenshot shows the same 'Data Categories' interface after the activation. The 'Active Category Groups' list now includes 'Customer Services & Bookings', 'Check in / Check out Policies', and 'Invoices & Discounts'. The 'Categories in Invoices & Discounts' panel remains the same, with 'All' expanded and 'Invoices' and 'Discounts' visible.

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

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Knowledge	Knowledge_kav	Custom Object		11/30/2022	✓

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

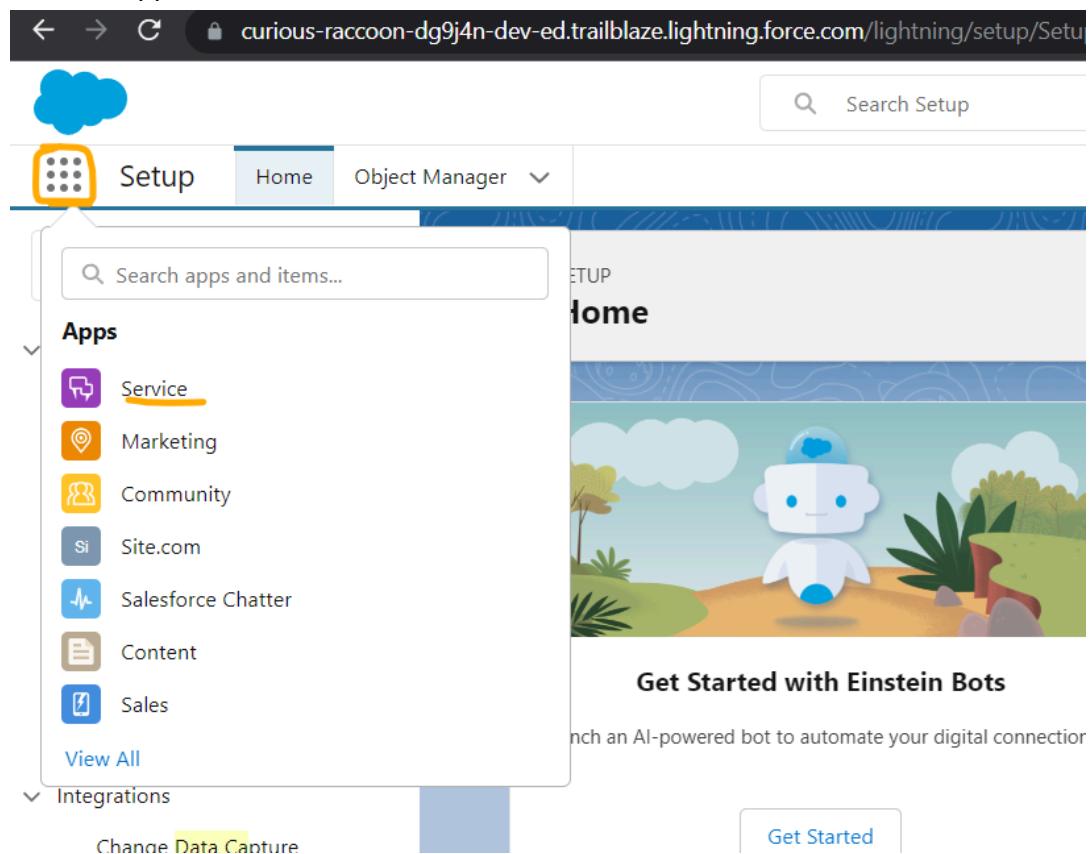
12.7. Once fields are added, click on Save

Create Knowledge Article (⏰ 15 mins)

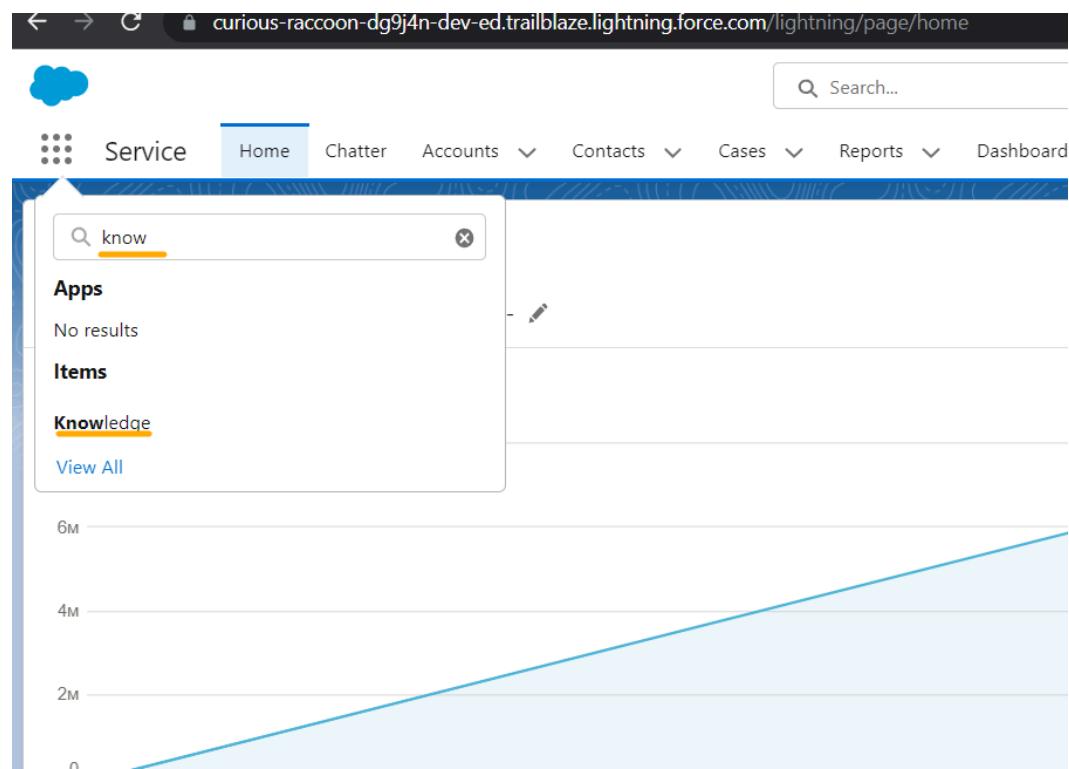
Now, we can start creating knowledge articles to show in our customer portal

13. Create and Publish Articles

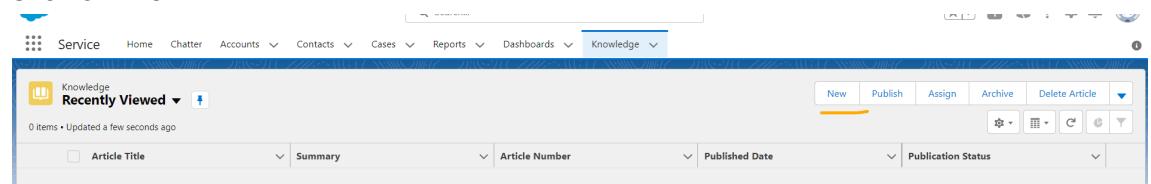
13.1. Click on App Launcher > Service



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

	<p>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.</p>		
Can I Amend My Bookings?	<p>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</p>	Yes	Bookings

	<p>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.</p>		
Do you allow pets?	<p>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</p>	Yes	Check in / Check out policies

	<p>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).</p>		
What time is Check In/Check Out?	<p>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.</p> <p>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.</p> <p>If you would</p>	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		
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nts

New Knowledge

Information

* Title
Can I chat to someone in Customer Services?

Summary ⓘ
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.

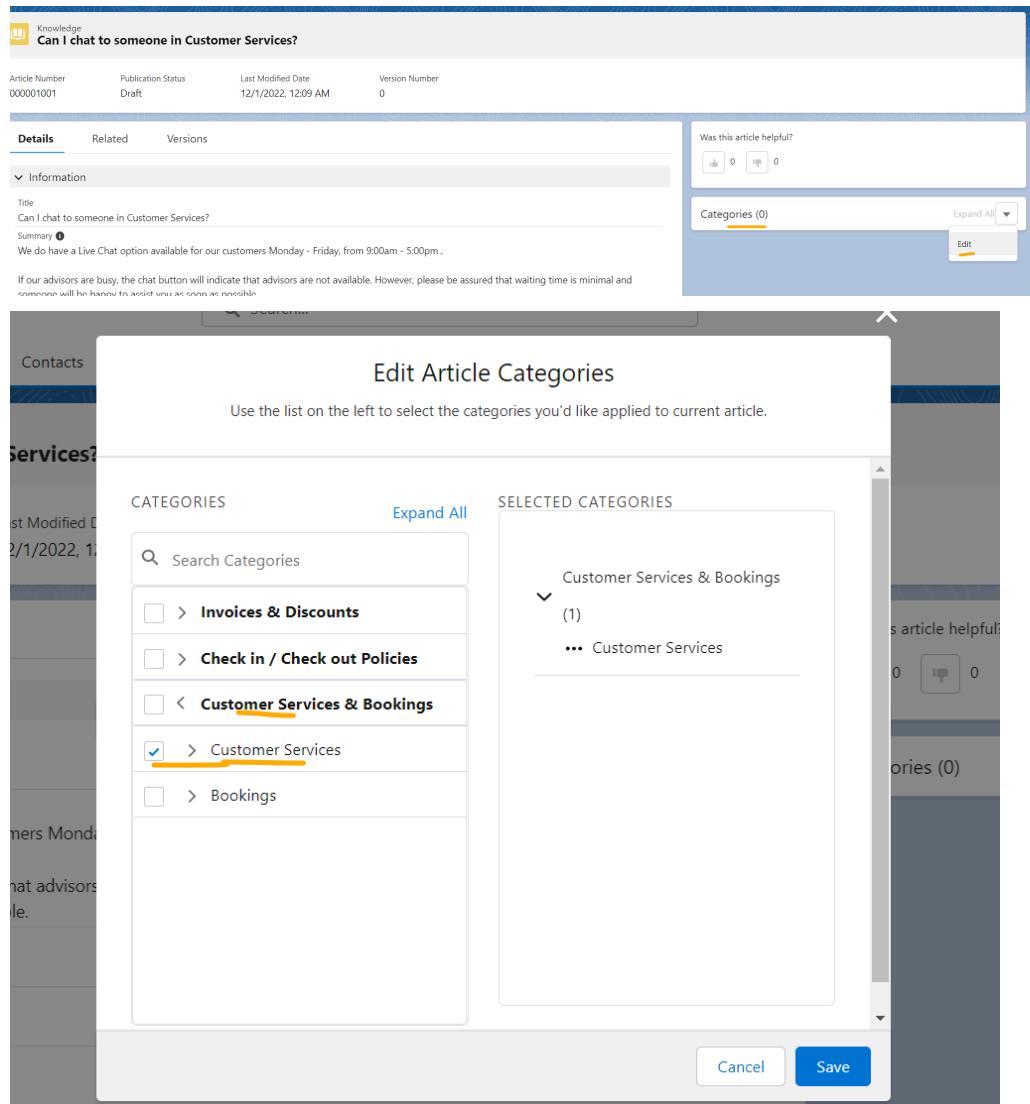
* URL Name
Can-I-chat-to-someone-in-Customer-Services

Visible In Public Knowledge Base

Visible to Customer

Visible to Partner

sh Assign Publication



- 13.4.5. Repeat the steps and create as many articles as you need
- 13.4.6. Once a draft version is created, you should publish the article
 - 13.4.6.1. All draft versions are listed as below

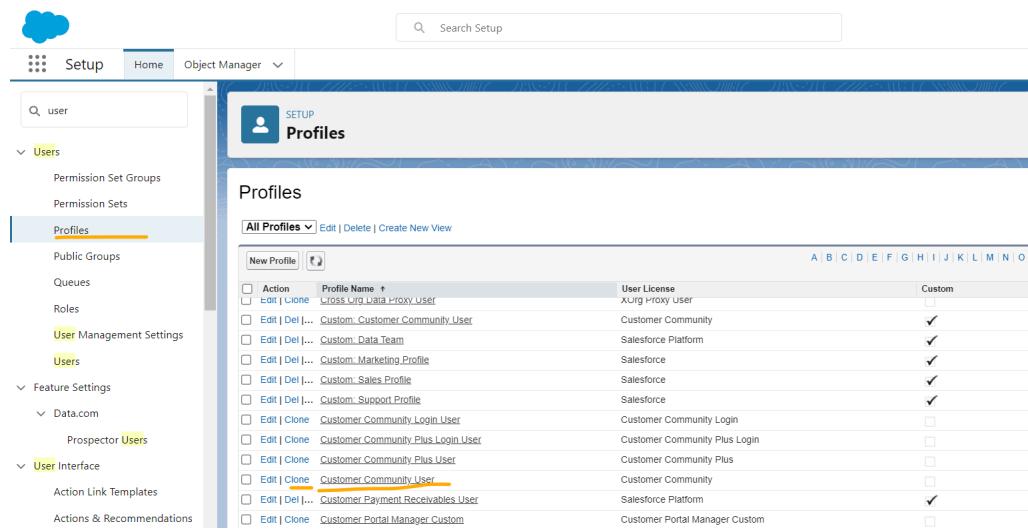
The screenshot shows the 'Draft Articles' list view. It displays one item: 'Can I chat to someone in Customer Services?'. The article title is bolded and highlighted in orange. The list view includes columns for 'Article Title' and 'Summary'. At the top of the list view, there are buttons for 'New', 'Publish', 'Assign', 'Archive', and 'Delete Article'.

- 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



The screenshot shows the Salesforce Setup interface with the 'Profiles' page open. The left sidebar navigation includes 'Setup', 'Home', and 'Object Manager'. Under 'Users', the 'Profiles' tab is selected. The main content area displays a table titled 'Profiles' with columns for 'Action', 'Profile Name', 'User License', and 'Custom'. The table lists various profiles, including 'Cross Org Data Proxy User', 'Customer Community User', 'Data Team', 'Marketing Profile', 'Salesforce', 'Salesforce Platform', 'Customer Community Login', 'Customer Community Plus Login', 'Customer Community Plus User', 'Customer Community User', 'Customer Payment Receivables User', and 'Customer Portal Manager Custom'. The 'Customer Community User' row is highlighted with a yellow background.

- 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

The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected. The left sidebar includes sections for Permission Set Groups, Permission Sets, Profiles (which is highlighted), Public Groups, Queues, Roles, User Management Settings, and various Data.com and User Interface settings. The main content area displays a table of profiles under the heading 'Profiles'. The table has columns for Action, Profile Name, and User License. The 'User License' column includes checkboxes for Custom, Analytics Cloud Integration User, Authenticated Website, Chatter External, Chatter Free, Chatter Moderator, Contract Manager, XOrg Proxy User, Customer Community, Salesforce Platform, Salesforce, and Salesforce Support. Several profiles have their 'Read' checkbox checked, indicated by a checkmark in the 'Read' column.

Action	Profile Name	User License
<input type="checkbox"/>	Analytics Cloud Integration User	Custom
<input type="checkbox"/>	Analytics Cloud Security User	Analytics Cloud Integration User
<input type="checkbox"/>	Authenticated Website	Authenticated Website
<input type="checkbox"/>	Authenticator Website	Authenticated Website
<input type="checkbox"/>	Chatter External User	Chatter External
<input type="checkbox"/>	Chatter Free User	Chatter Free
<input type="checkbox"/>	Chatter Moderator User	Chatter Free
<input type="checkbox"/>	Contract Manager	Salesforce
<input type="checkbox"/>	Cross Org Data Proxy User	XOrg Proxy User
<input type="checkbox"/>	Custom: Customer Community User	Customer Community
<input type="checkbox"/>	Custom: Data Team	Salesforce Platform
<input type="checkbox"/>	Custom: Marketing Profile	Salesforce
<input type="checkbox"/>	Custom: Sales Profile	Salesforce
<input type="checkbox"/>	Custom: Support Profile	Salesforce

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

The screenshot shows the 'Custom Object Permissions' section of the Salesforce Setup Profiles page. The left sidebar lists Profiles, Public Groups, Queues, Roles, User Management Settings, and various Data.com and User Interface settings. The main content area has two tables: 'Environments' and 'Knowledge Base Permissions'. The 'Knowledge Base Permissions' table specifically highlights the 'Knowledge' object. It shows a 'Basic Access' row with checkboxes for Read (which is checked), Create, Edit, Delete, View All, and Modify All. Below this is a 'Data Administration' row with checkboxes for View All and Modify All. The 'Knowledge' object also has a 'Session Settings' section at the bottom.

	Basic Access	Create	Edit	Delete	Data Administration
Knowledge	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	View All	Modify All			

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'

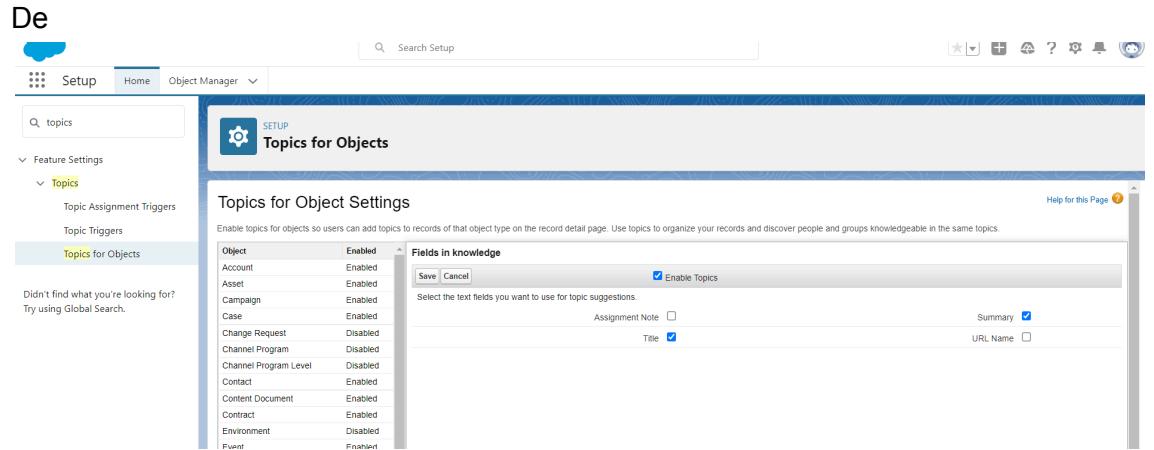
Action	Category Group	Visibility	Visibility Details
Edit	Check in / Check out Policies	All	All categories are visible to this profile
Edit	Customer Services & Bookings	All	All categories are visible to this profile
Edit	Invoices & Discounts	All	All categories are visible to this profile

Page Layouts					
Standard Object Layouts				Idea	Varies by Record Type
Global	Global Layout [View Assignment]			Individual	Individual Layout [View Assignment]
Email Application	Not Assigned [View Assignment]			Invoice	Invoice Layout [View Assignment]
Home Page Layout	Home Page Default [View Assignment]			Invoice Line	Invoice Line Layout [View Assignment]
Access	Access Layout [View Assignment]			Legal Entity	Legal Entity Layout [View Assignment]
Account	Account Layout [View Assignment]				

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

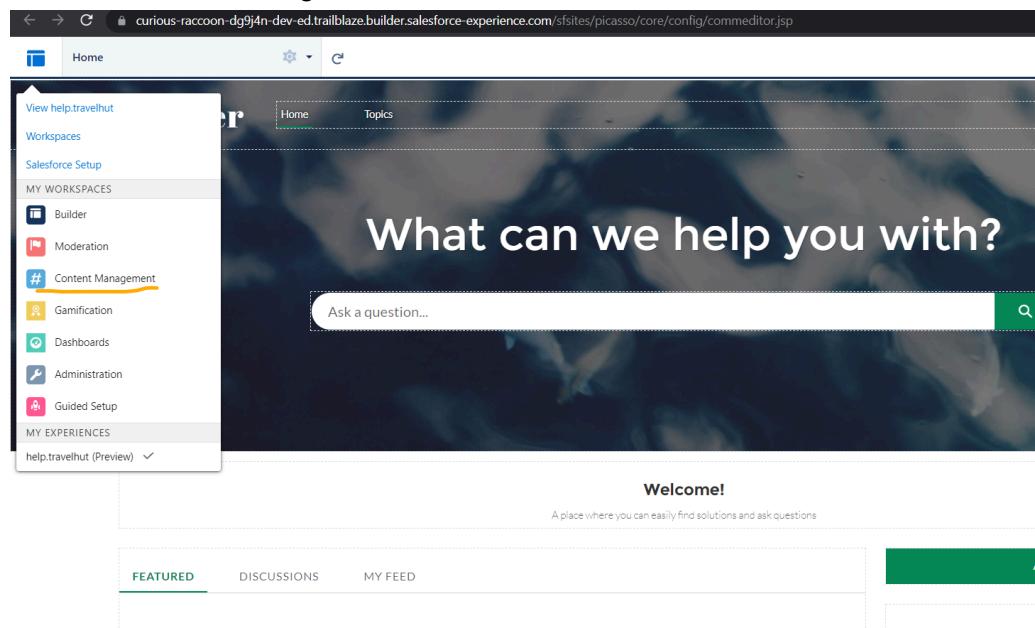
16. Click on Setup

16.1. Search for 'Topics for object' and Enable Topics as below and Save



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

The screenshot shows the Content Management interface with the 'Topics' tab selected. Under 'Automatic Topic Assignment', the 'Customer Services & Bookings' group is selected. The 'Customer Services' category is chosen. A button labeled 'CUSTOMER SERVICES X ADD TOPIC' is visible. Below it is a checkbox for adding topics to all existing articles. At the bottom are 'Save' and 'Cancel' buttons.

The screenshot shows the Content Management interface with the 'Topics' tab selected. Under 'Automatic Topic Assignment', the 'Bookings' group is selected. The 'BOOKINGS' category is chosen. A button labeled 'BOOKINGS X ADD TOPIC' is visible. Below it is a checkbox for adding topics to all existing articles. At the bottom are 'Save' and 'Cancel' buttons.

- 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

The screenshot shows the 'Topic Management' page. A table lists topics: BOOKINGS, CHECK IN / CHECK OUT POLICIES, CUSTOMER SERVICES, DISCOUNTS, INVOICES, and POLICIES. All topics have 'Enabled For' set to 'Content'. There are 'New', 'Merge', and 'Enable for Content' buttons at the top right.

Name	Enabled For
BOOKINGS	Content
CHECK IN / CHECK OUT POLICIES	Content
CUSTOMER SERVICES	Content
DISCOUNTS	Content
INVOICES	Content
POLICIES	Content

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

The screenshot shows the 'Content Management' interface for 'help.travelhut'. The 'Topics' tab is selected. On the left, a sidebar lists 'Topic Management', 'Navigational Topics', 'Featured Topics', 'Article Management' (which is selected), and 'Automatic Topic Assignment'. The main area displays a search bar with placeholder 'Search articles...', a dropdown for 'Show' set to 'All Articles', and two 'Select' buttons for 'Data Category Group' and 'Data Category'. Below this is a section titled 'ARTICLE NAME' with a blue header 'Add Topics'. Inside this section, article details are shown: Title 'What is an eVoucher?', Article Number '000001008', Version Number '1', Article Type 'Knowledge', Created Date 'Dec 1, 2022, 12:17:56 AM', and Last Published Date 'Dec 1, 2022, 12:18:50 AM'. A text input field contains 'disco' and a button labeled 'DISCOUNTS' is visible. At the bottom, a link 'How can I get a VAT invoice?' is followed by a pencil icon.

Content Management
help.travelhut

Content Collections Topics Recommendations

ARTICLE NAME

What is an eVoucher?

How can I get a VAT invoice?

How do I cancel my booking?

Add Topics

Title Do you allow pets?

Article Number 000001005

Version Number 1

Article Type Knowledge

Created Date Dec 1, 2022, 12:15:57 AM

Last Published Date Dec 1, 2022, 12:18:50 AM

CHECK IN / CHECK OUT POLICIES POLICIES

Add Topic

Save Cancel

What time is Check In/Check Out?

Cancel a Booking

Can I Amend My Bookings?

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

The screenshot shows the Content Management interface with the 'Topics' tab selected. A modal window is open for adding a featured topic named 'CUSTOMER SERVICES'. The modal includes fields for 'Upload thumbnail image' and dimensions '385 x 385 px'. Buttons for 'Save' and 'Cancel' are at the bottom.

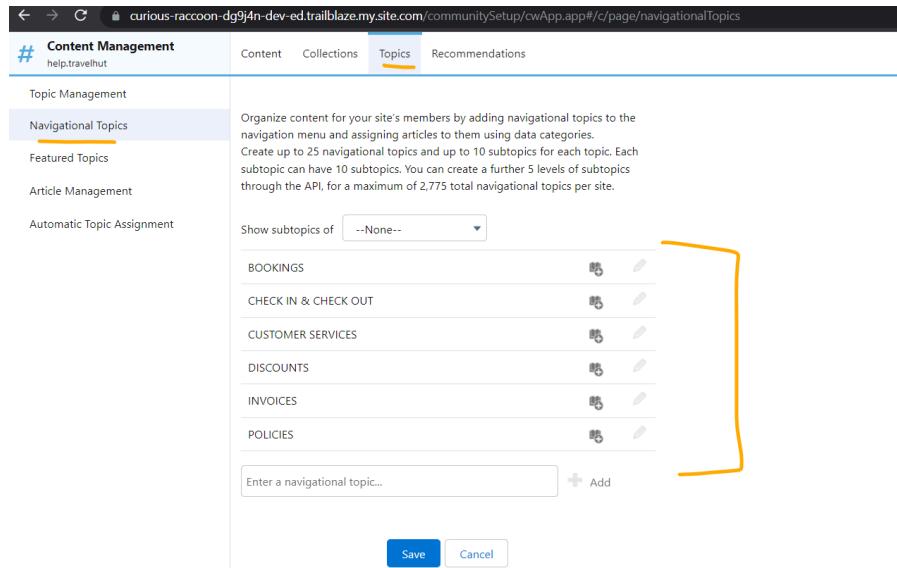
- 18.2. Once featured topics have been added, it can further be customized by uploading a picture

The screenshot shows the Content Management interface with the 'Topics' tab selected. A modal window is open for adding a featured topic named 'CHECK IN / CHECK OUT POLICIES'. The modal includes a field for 'Upload thumbnail image' and dimensions '385 x 385 px'. Buttons for 'Close' and 'Remove' are at the bottom. Below the modal, other featured topics like 'BOOKINGS', 'CUSTOMER SERVICES', 'DISCOUNTS', 'INVOICES', and 'POLICIES' are listed with edit icons.

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



The screenshot shows the 'Content Management' section of a web application. The 'Topics' tab is selected. On the left, there's a sidebar with 'Topic Management' and links for 'Help', 'Content', 'Collections', 'Topics' (which is active), and 'Recommendations'. The main area displays a list of navigational topics: BOOKINGS, CHECK IN & CHECK OUT, CUSTOMER SERVICES, DISCOUNTS, INVOICES, and POLICIES. Each topic has a small edit icon next to it. Below the list is a search bar with 'Enter a navigational topic...' and an 'Add' button. At the bottom are 'Save' and 'Cancel' buttons.

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

SETUP > OBJECT MANAGER
Knowledge

Save Quick Save Cancel Undo Redo Layout Properties

Fields

Section	Article Archived ...	Article Number	Assigned By	Assignment Note
Archived By	Article Case Asso...	Article Primary L...	Assigned To	Created By
Archived Date	Article Created By	Article Total Vie...	Assignment Date	Created Date
Article Archived By	Article Created Date	Article Type	Assignment Due Date	First Published Date

Salesforce Mobile and Lightning Experience Actions

Actions in this section are predefined by Salesforce. You can [override the predefined actions](#) to set a customized list of actions on Lightning Experience and in the Salesforce Classic Publisher section, and have saved the layout, then this section inherits that set of actions by default when you click to override.

Knowledge Detail

Information

- Title: Sample Text
- Summary: Sample Text
- URL Name: Sample Text

Custom Links (Header visible on detail only)

Related Lists

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

20.7.1. Click on ‘Page Layout Assignment’

Setup Home Object Manager

SETUP > OBJECT MANAGER
Knowledge

Page Layouts

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Knowledge Layout	Butterfly - 11/30/2022, 5:14 AM	Butterfly - 11/30/2022, 11:58 PM
Knowledge Layout - Community User	Butterfly - 12/2/2022, 4:08 AM	Butterfly - 12/2/2022, 4:25 AM

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

SETUP > OBJECT MANAGER
Knowledge

Edit Page Layout Assignment

The table below shows the page layout assignments for different profiles. Use SHIFT + click or click and drag to select a range of adjacent cells. Use CTRL + click to select multiple page layout from the dropdown.

Page Layout To Use: Knowledge Layout - Community User ▾ 1 Selected 1 Changed

Profiles	Page Layout
Analytics Cloud Integration User	Knowledge Layout
Analytics Cloud Security User	Knowledge Layout
Authenticated Website	Knowledge Layout
Authenticated Website	Knowledge Layout
Chatter External User	Knowledge Layout
Chatter Free User	Knowledge Layout
Chatter Moderator User	Knowledge Layout
Contract Manager	Knowledge Layout
Cross Org Data Proxy User	Knowledge Layout
Custom: Customer Community User	Knowledge Layout - Community User
Custom: Data Team	Knowledge Layout
Custom: Marketing Profile	Knowledge Layout
Custom: Sales Profile	Knowledge Layout
Custom: Support Profile	Knowledge Layout
Customer Community Login User	Knowledge Layout
Customer Community Plus Login User	Knowledge Layout

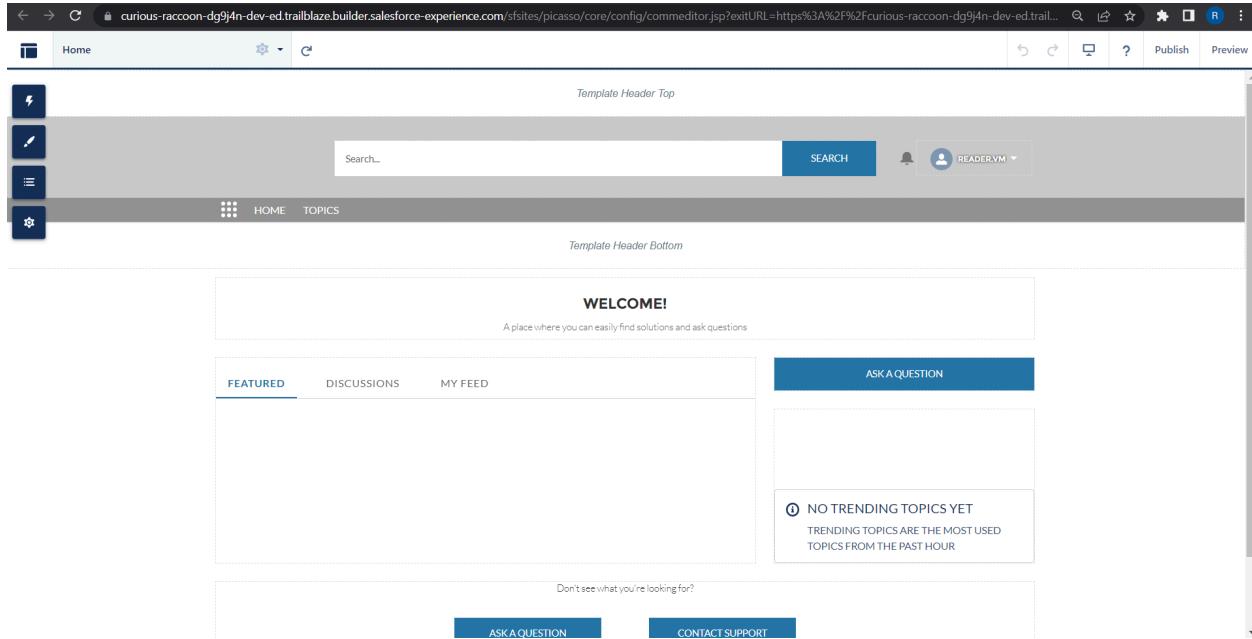
20.7.3. Click on ‘Save’

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



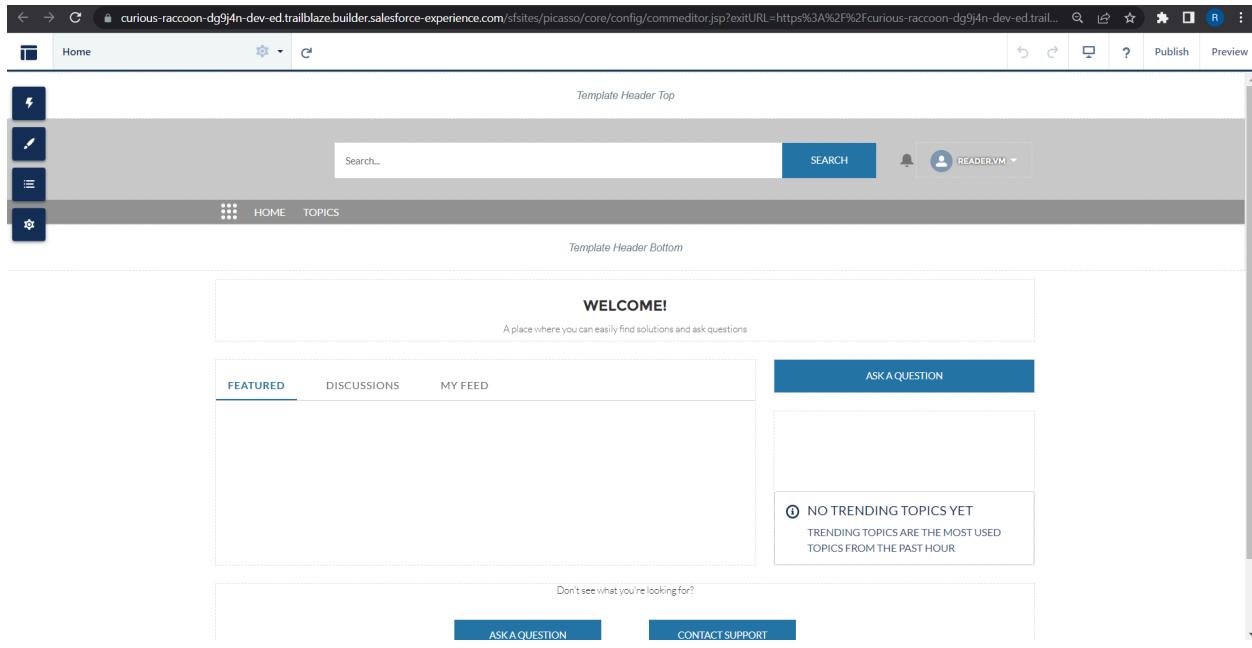
21.5. Open “Members” option on the left panel

21.5.1. Add Custom:Customer Community User as below & Save

The screenshot shows the 'Members' setup page in the Salesforce Administration interface. On the left, a sidebar lists various settings like 'Settings', 'Preferences', 'Members' (which is selected), 'Contributors', 'Login & Registration', 'Emails', 'Pages', 'Rich Publisher Apps', and 'URL Redirects'. The main content area is titled 'Members' and contains a note: 'All users with the selected profiles OR permission sets are members.' A tooltip explains: '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.' Below this is a 'Select Profiles' section with a search bar and a 'Find' button. Two lists are shown: 'Available Profiles' (containing various user types) and 'Selected Profiles' (containing 'System Administrator' and 'Custom: Customer Community User'). There are 'Add' and 'Remove' buttons between the lists. Below this is a 'Select Permission Sets' section with a search bar and a 'Find' button. Two lists are shown: 'Available Permission Sets' (containing 'CodeBuilder' and 'Partner Management App') and 'Selected Permission Sets' (containing '--None--').

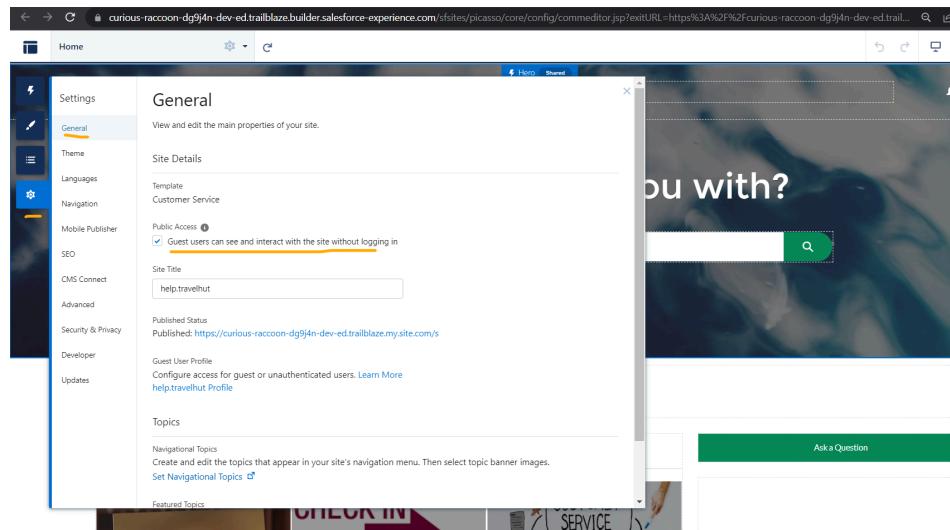
Enable customer portal for guest / unauthenticated users (15 mins)

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

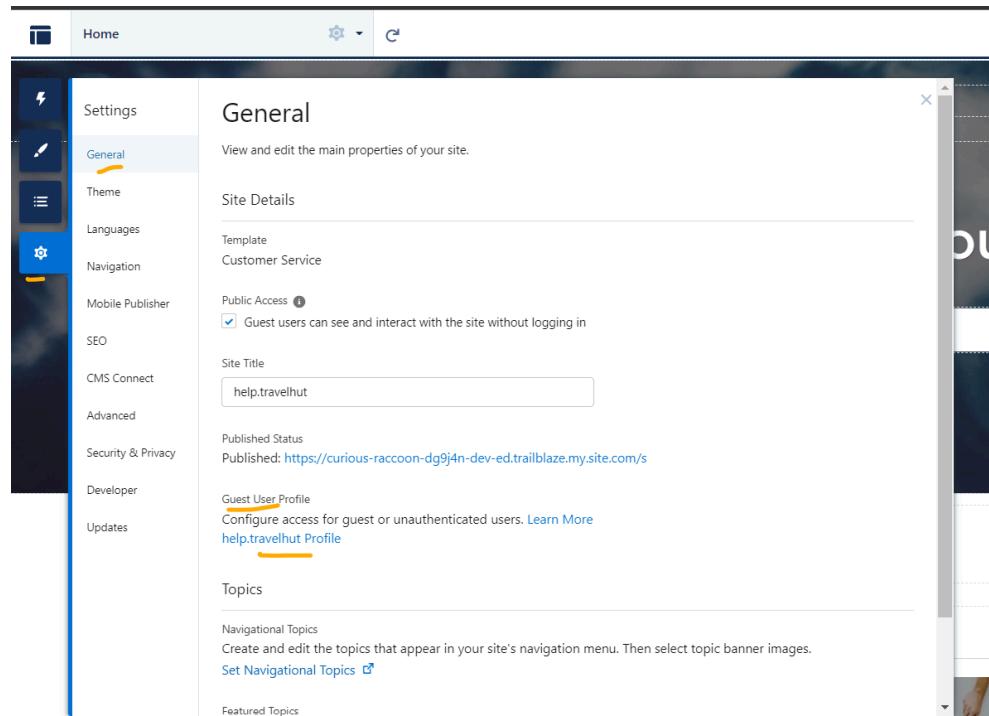


22.5. Open “Settings” option on the left panel

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

Action	Category Group	Visibility	Visibility Details
Edit	Check In / Check Out Policies	All	All categories are visible to this profile
Edit	Customer Services & Bookings	All	All categories are visible to this profile
Edit	Invoices & Discounts	All	All categories are visible to this profile

Standard Object Layouts	Global	Location
Email Application	Global Layout [View Assignment]	Location Layout [View Assignment]
Object Milestone	Not Assigned [View Assignment]	Object Milestone Layout [View Assignment]
Opportunity	Home Page Layout Home Page Default	Opportunity Layout [View Assignment]

22.6.2. On the profile page, choose object settings

Profile
help.travelhut Profile

Profile Overview

Description	Assigned Users
User License	Guest User License
Last Modified By	Butterfly... 12/2/2022, 3:46 AM

Custom Profile **Created By** **Butterfly... 11/29/2022**

Apps

- Assigned Apps**: Settings that specify which apps are visible in the app menu
- Assigned Connected Apps**: Settings that specify which connected apps are visible in the app menu
- Object Settings**: Permissions to access objects and fields, and settings that specify which record types, page layouts, and tabs are visible
- App Permissions**: Permissions to perform app-specific actions, such as "Manage Call Centers"
- Apex Class Access**: Permissions to execute Apex classes
- Visualforce Page Access**: Permissions to execute Visualforce pages

- 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

SETUP Profiles

Data Use Purposes

Custom Object Permissions

Environments	Basic Access						Data Administration	
	Read	Create	Edit	Delete	View All	Modify All	Part	
Environments	<input type="checkbox"/>	<input type="checkbox"/>					Ses	
Partner Performance Reviews	<input type="checkbox"/>	<input type="checkbox"/>						

Knowledge Base Permissions

Knowledge	Basic Access						Data Administration	
	Read	Create	Edit	Delete	View All	Modify All		
Knowledge	<input checked="" type="checkbox"/>	<input type="checkbox"/>						

Session Settings

Session Times Out After	2 hours of inactivity	Session Security Level Required
Separate Experience Cloud site and Salesforce login authentication for	<input type="checkbox"/>	

- 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

curious-raccoon-dg9j4n-dev-ed.trailblaze.builder.salesforce-experience.com/sfsites/picasso/core/config/comeditor.jsp

Home Topics

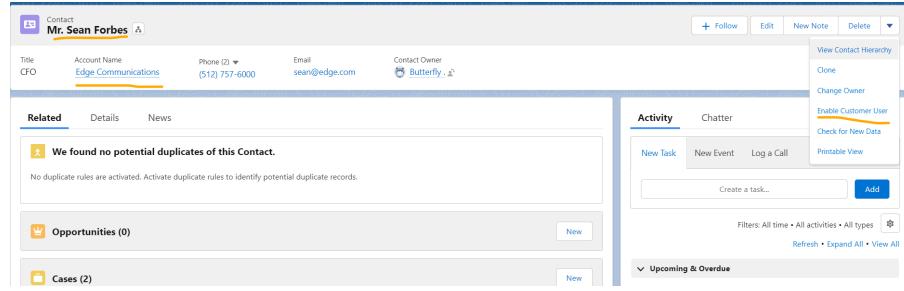
22.8. Publish your changes

Enable Guest Users to submit cases

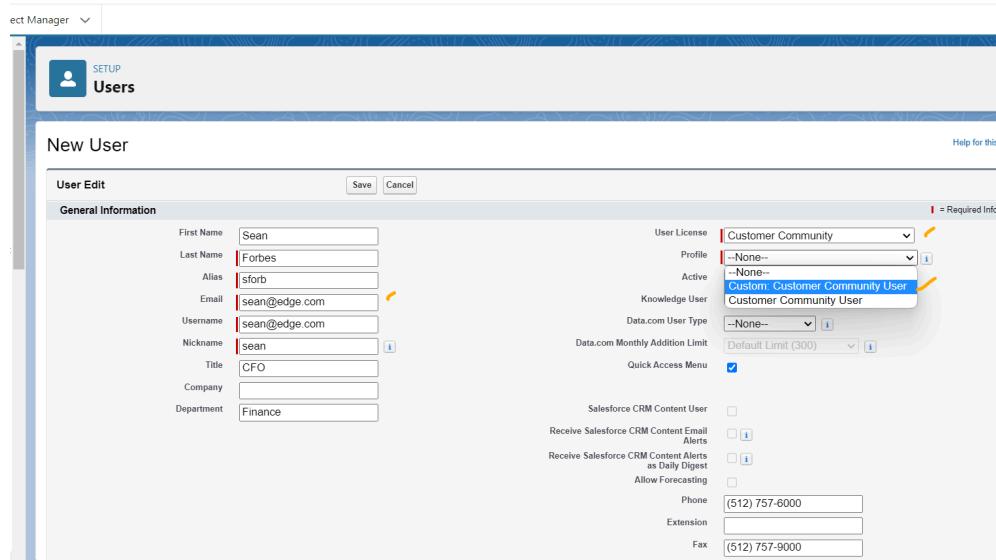
23. In Lightning Experience
 - 23.1. Click the gear icon, then click Setup.
 - 23.2. Enter Digital Experiences in the Quick Find box, then click on All Sites.
 - 23.3. Click Workspaces next to the site in which you want your Guest Users to log Cases via 'Contact Support.'
 - 23.4. From the Experience 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



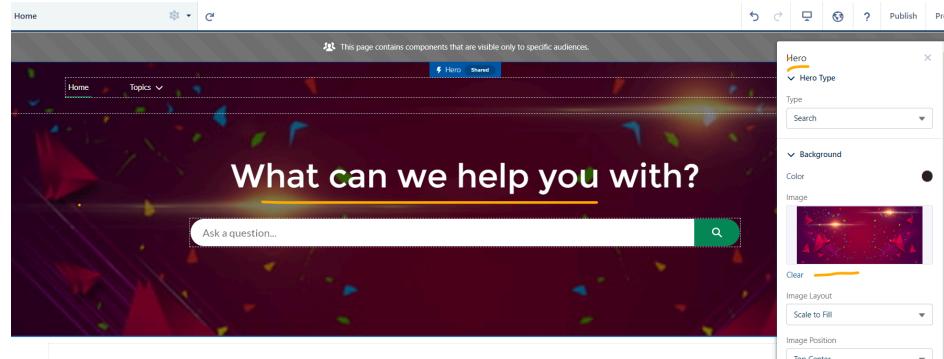
- 25.3. Once you are redirected to the user record screen, ensure license and profile are mapped as below



- 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

Theme Settings

What pages do these settings affect?

- Show header
- Fix the header's position
- Show hero
- Start hero under header
- Set max page width

Max Page Width (640px - 1920px) 1,440

Edit CSS

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

Search

Placeholder Text Ask a question...

Autocomplete

Use autocomplete in searches

Max Autocomplete Results (1 - 10) 6

Objects in Autocomplete Results Knowledge

Add

Style: General

Style: Autocomplete