Design and Development of a Customer Portal using Salesforce Experience Cloud

Prepared by: Yaramala Varshitha

Problem Statement

In many organizations, external websites, portals, or communities must integrate tightly with business-process systems and data. Traditional web development platforms often lack seamless integration with CRM, user authentication, permissioning, and dynamic content driven by business logic.

The problem is: how to build a website or portal that is fully integrated with Salesforce data and logic, supports role-based access, allows customization, is maintainable, and delivers a seamless user experience—without reinventing the wheel each time.

Issues to address include:
- Secure user authentication and authorization tied to CRM records
- Dynamic pages and templates that draw directly from Salesforce objects
- Easy customization and branding without heavy coding
- Scalability, maintainability, and governance
- Support for multiple user types (e.g., customers, partners, internal users) with different permissions

Overview

Salesforce Experience Cloud (formerly 'Community Cloud') is a platform for building digital experiences — websites, portals, communities — that integrate deeply with Salesforce's data, security, and business logic.

Key features include:
- Drag-and-drop site builder and templates
- Page variations, themes, branding, and CSS overrides
- Components, both standard and custom Lightning components
- Security model using profiles, permission sets, sharing sets, and guest users
- Navigation, page routing, SEO, CMS integration
- Member management (registration, login, profile, roles)
- Integration with Salesforce objects, flows, Apex, and APIs
- Deployment and lifecycle (Sandboxes, change sets, source control)

Using Experience Cloud, you can deliver a website or partner/customer portal that stays in sync with your Salesforce CRM and automates business workflows.

Phases of Implementation

Phase 1: Discovery & Requirements Gathering

This phase focuses on understanding the needs of stakeholders and end users. It involves conducting interviews, creating user personas, analyzing content requirements, and identifying functional and non-functional requirements. Security and integration needs are also defined.

Phase 2: Solution Design & Architecture

In this stage, the overall solution is designed. It includes deciding the site structure, data model, security and permission architecture, navigation strategy, component strategy, and page templates.

Phase 3: Environment Setup & Provisioning

The Experience Cloud site environment is provisioned. This involves assigning licenses, setting up development and testing environments, configuring domains, and enabling essential site settings.

Phase 4: Theme & Branding Setup

Here, branding and design elements are configured. Themes are chosen or customized, logos, fonts, and color schemes are applied, and responsive layouts are set up to match the organization's identity.

Phase 5: Page & Navigation Construction

During this phase, site pages are created using templates and layouts. Navigation menus are defined, page variations are set up for different devices, and routing rules for clean URL structures are established.

Phase 6: Component Development & Customization

Standard components are used where possible, while custom Lightning components or LWCs are developed if needed. Integration with Apex classes, flows, and APIs is also performed in this phase.

Phase 7: Security & Access Configuration

The security model is implemented in this stage. Profiles, permission sets, sharing sets, and roles are configured to ensure that guest users, authenticated users, customers, and partners have appropriate access levels.

Phase 8: Content & Data Integration

Content is uploaded and integrated into the site. This includes CMS content, static and dynamic resources, and Salesforce data. Record lists, forms, and approval flows are configured to enable interaction with Salesforce data.

Phase 9: Testing, QA & UAT

Rigorous testing is performed, including functional testing, integration testing, and security validation. Performance testing ensures scalability, while User Acceptance Testing (UAT) collects feedback from end users for improvements.

Phase 10: Deployment & Maintenance

Finally, the solution is deployed to the production environment. Ongoing monitoring, analytics, user support, and governance are set up. Continuous enhancements and change management processes are followed to ensure long-term success.

Phase 1: Discovery & Requirements Gathering

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Problem Statement

Organizations seeking to build digital experiences with Salesforce Experience Cloud face the challenge of aligning business goals with technical implementation. Before developing a website or portal, it is crucial to gather clear requirements, identify stakeholders, and establish a foundation that ensures success. Without a structured discovery phase, projects often face scope creep, misaligned objectives, and integration challenges.

Requirements Gathering

This phase involves collecting comprehensive business and technical requirements to define the scope and direction of the project. Key steps include:

- - Conduct stakeholder interviews to capture expectations and goals.
- - Identify functional requirements such as login, registration, and data access.
- - Define non-functional requirements like performance, security, and scalability.
- - Document integration needs with Salesforce objects, APIs, and external systems.
- - Gather content requirements including text, images, and CMS integrations.

Objectives

The objectives of Phase 1 include:

- - Establishing clear alignment between business strategy and digital goals.
- - Building a roadmap for Experience Cloud implementation.
- - Reducing risks by validating assumptions early in the process.
- - Ensuring user experience and technical feasibility are balanced.
- - Defining measurable success criteria for the project.

Stakeholder Analysis

Identifying and analyzing stakeholders is a crucial part of Phase 1. Key groups include:

- - Business Owners: Define strategic goals and KPIs.
- - IT Teams: Ensure integration, security, and system architecture.
- - End Users: Provide insights into usability, functionality, and design needs.

- - Administrators: Manage data, permissions, and long-term governance.
- - External Partners: Contribute requirements for collaboration and portal use.

AppExchange Exploration

The Salesforce AppExchange provides prebuilt solutions that can accelerate implementation. During Phase 1, the team should explore:

- - Authentication and security packages for login/SSO.
- - CMS connectors for integrating external content systems.
- - Industry-specific components that save development time.
- - Analytics and reporting tools for enhanced insights.
- - Productivity tools to improve collaboration and user adoption.

Industry Uses

Salesforce Experience Cloud has wide applicability across industries:

- - Healthcare: Patient portals with secure access to medical records.
- - Education: Student and faculty portals for communication and learning.
- - Finance: Client portals for secure document sharing and services.
- - Retail: Customer engagement portals with personalized experiences.
- - Manufacturing: Partner portals for distributors and resellers.

Additional Considerations

- - Risk assessment to identify potential project challenges early.
- - Budget and resource planning for later phases.
- - Timeline estimation with milestones for each project phase.
- - Governance framework to manage ongoing changes and updates.
- - Documentation standards to ensure knowledge transfer and consistency.

Phase 2: Solution Design & Architecture

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Problem Statement

Once requirements are gathered in Phase 1, the next challenge is translating them into a clear, scalable, and secure solution design. Without a well-defined architecture, projects risk poor user experience, data inconsistencies, security gaps, and difficulty in scaling. Phase 2 aims to establish the blueprint for the Experience Cloud implementation by defining site structure, navigation, security, and data models.

Objectives

The main objectives of Phase 2 include:

- - Define a scalable and secure site structure aligned with business goals.
- - Establish navigation flows for different user personas.
- - Design the Salesforce data model integration with the Experience Cloud site.
- - Determine templates, reusable components, and theme strategies.
- - Align the technical design with stakeholder expectations and industry best practices.

Solution Architecture Design

Key activities in this stage include:

- - Define the overall site architecture including portals, pages, and components.
- - Establish data flow between Salesforce CRM objects and the site.
- - Identify reusable Lightning Components and Lightning Web Components (LWCs).
- - Plan security layers: profiles, roles, permission sets, and sharing settings.
- - Document integration points with APIs, external services, or middleware.

Design Principles

Solution design should follow these guiding principles:

- - Simplicity: Keep navigation and user flows intuitive.
- - Scalability: Plan for growth in data volume and user traffic.
- - Security: Apply the principle of least privilege in user access.
- - Reusability: Create components and templates that can be reused across pages.
- - Maintainability: Ensure the design can be updated without heavy rework.

Stakeholder Involvement

In Phase 2, collaboration with key stakeholders is critical:

- - Business Owners: Validate that design aligns with business needs.
- - IT Architects: Ensure technical feasibility and integration with Salesforce ecosystem.
- - UX/UI Designers: Provide input for intuitive design and user experience.
- - Administrators: Offer insights into governance and maintainability.
- - Developers: Confirm component feasibility and performance considerations.

AppExchange Exploration

During Phase 2, exploring AppExchange can reveal prebuilt solutions that enhance design:

- - Navigation and menu components.
- - Security and compliance add-ons.
- - Analytics dashboards for Experience Cloud.
- - Industry-specific accelerators and templates.

Industry Applications

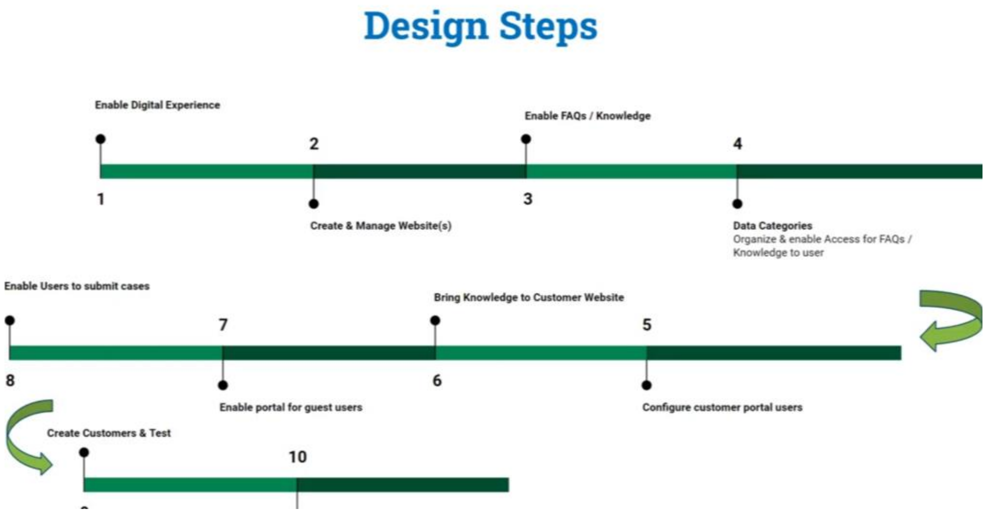
Phase 2 design varies across industries:

- - Healthcare: Designing portals with HIPAA-compliant access.
- - Education: Architecting student and faculty portals with learning modules.
- - Finance: Secure customer portals with role-based access to financial data.
- - Retail: Personalized portals with product recommendations and customer dashboards.
- - Manufacturing: Partner portals with dealer/distributor dashboards.

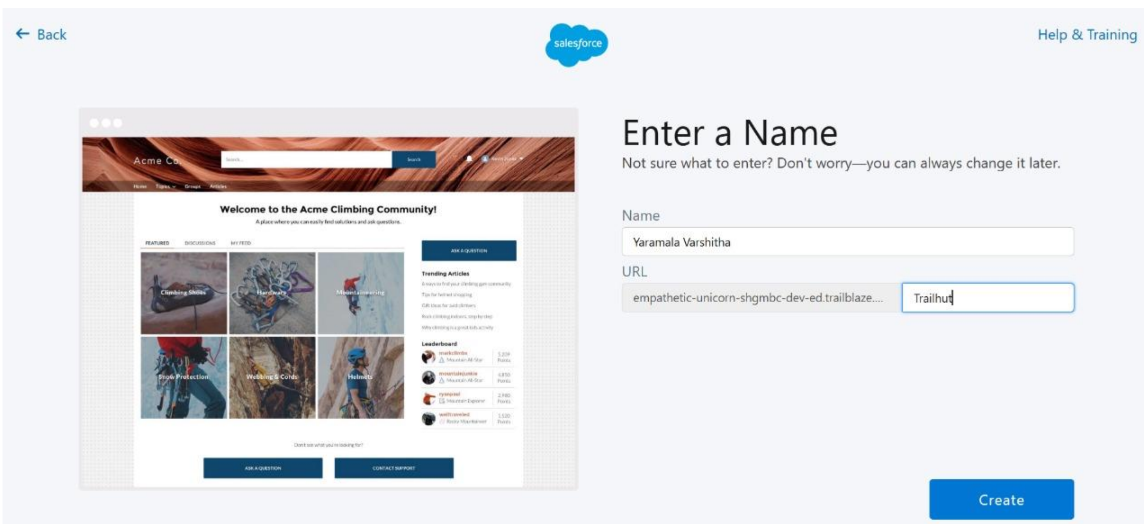
Additional Considerations

- - Risk analysis for scalability and integration challenges.
- - Alignment with compliance and regulatory requirements.
- - Planning for mobile responsiveness in design.
- - Documentation of architecture decisions for governance.

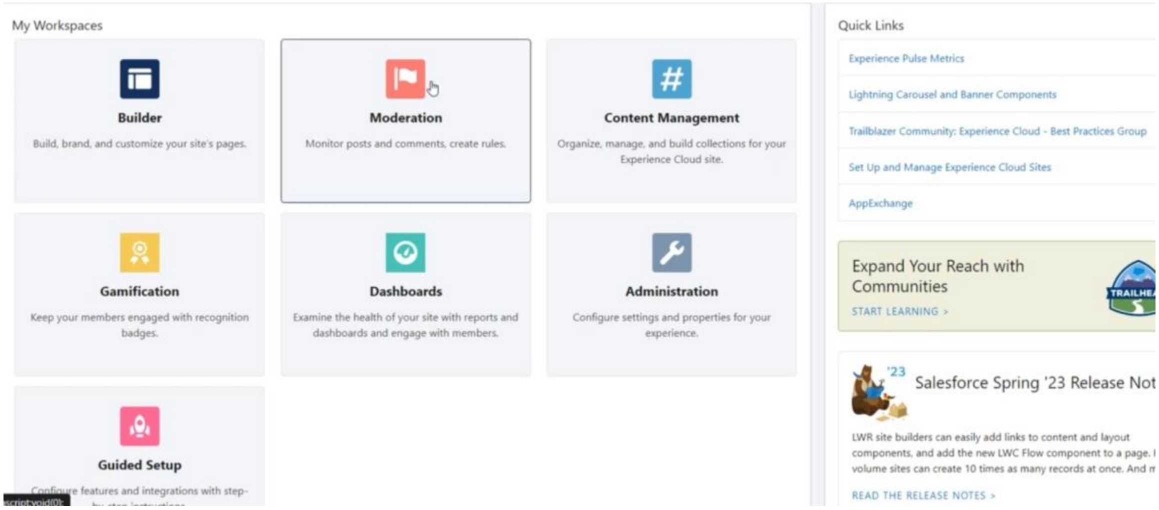
Site Architecture



Creating of Travel hut



Work Space of Travel hut



Phase 3: Environment Setup & Provisioning

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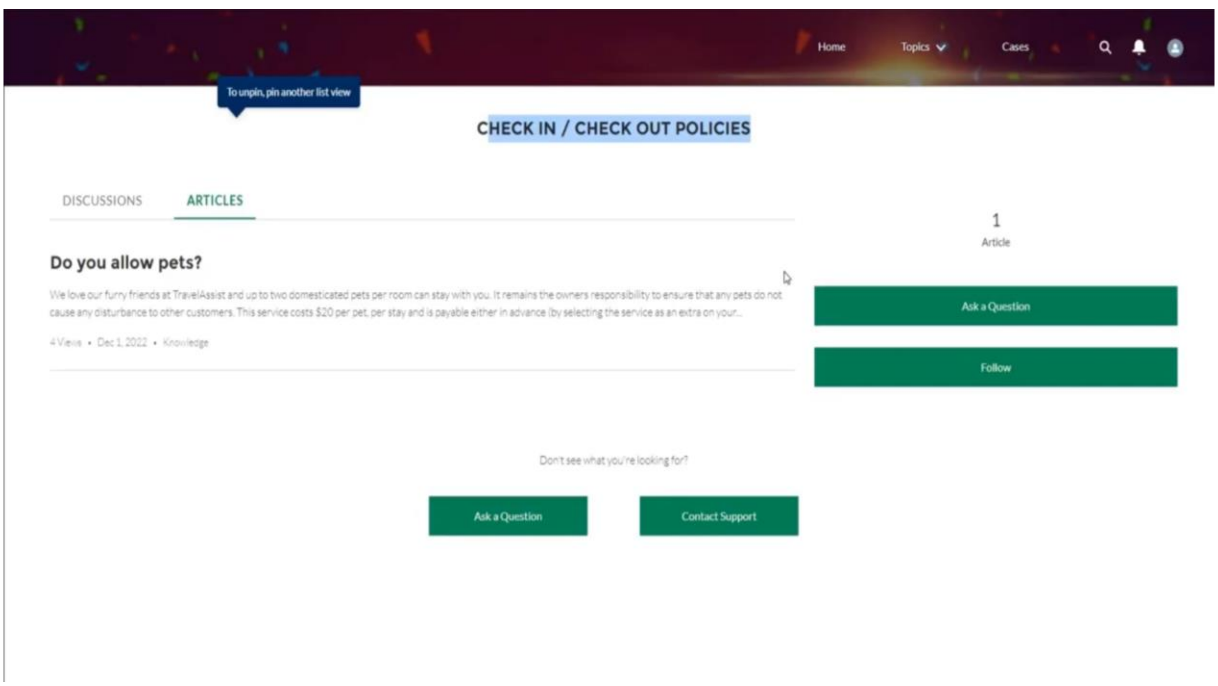
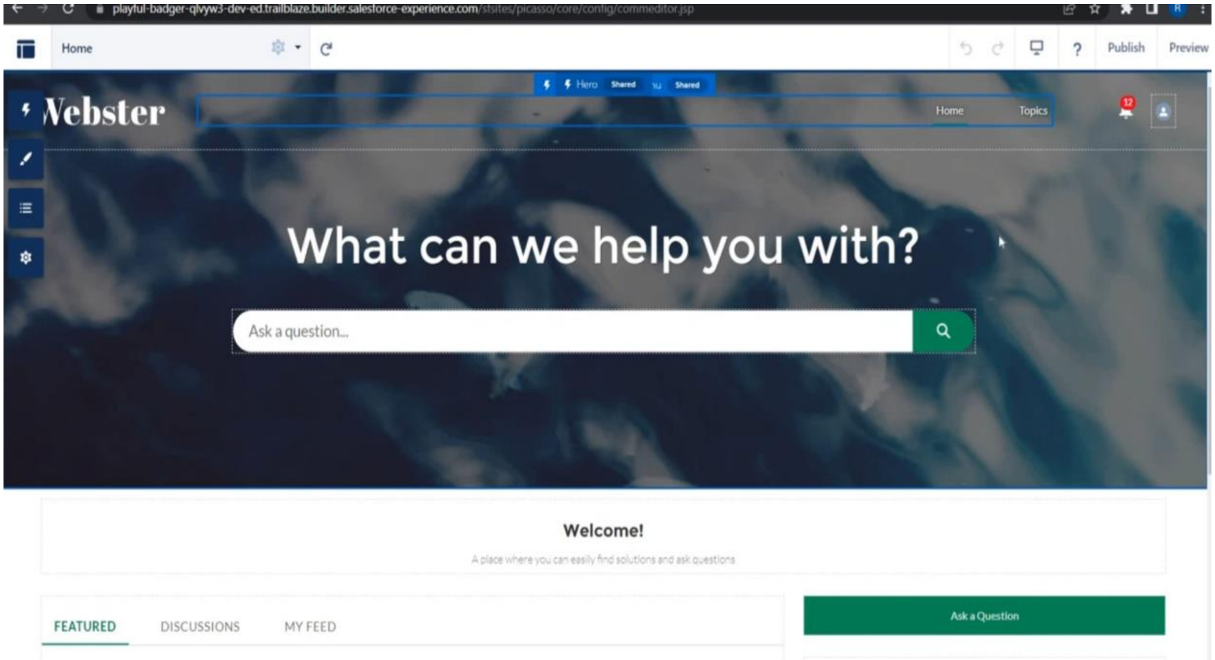
Phase 3 focuses on setting up the technical environment for Salesforce Experience Cloud. This includes provisioning sites, configuring domains, assigning licenses, and preparing development and testing environments. A proper setup ensures a smooth transition into design, customization, and deployment.

Step 1: Check In – Check Out Profile

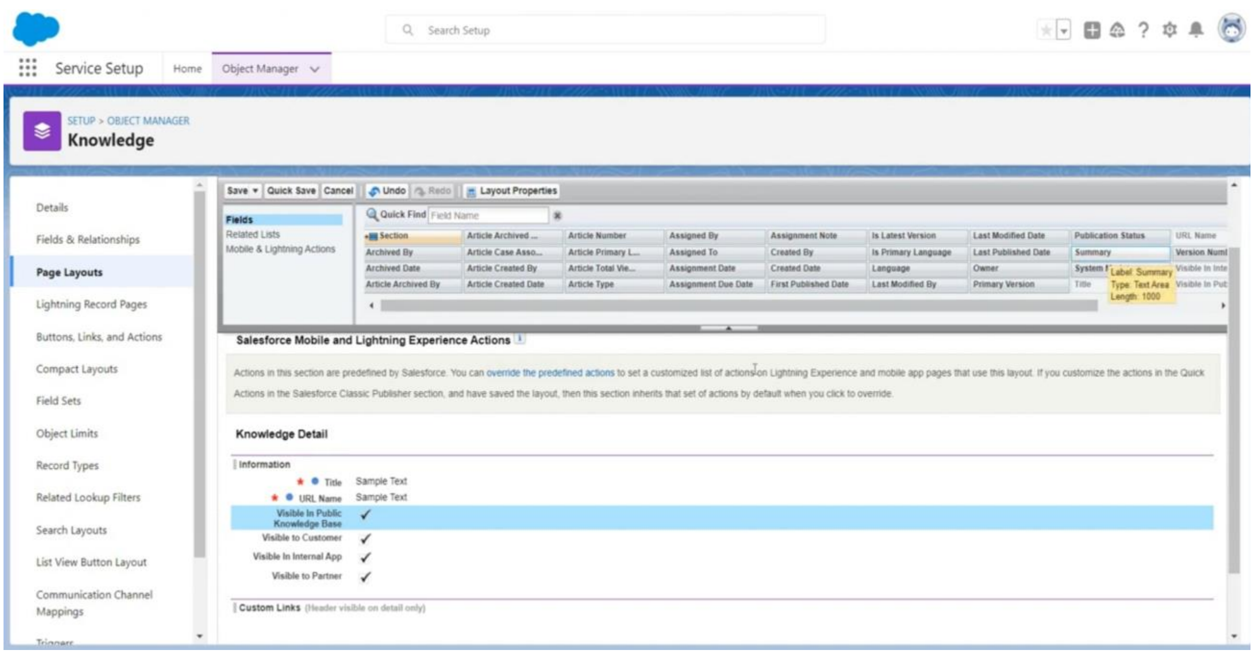
In this step, you create Check In – Check Out Profile



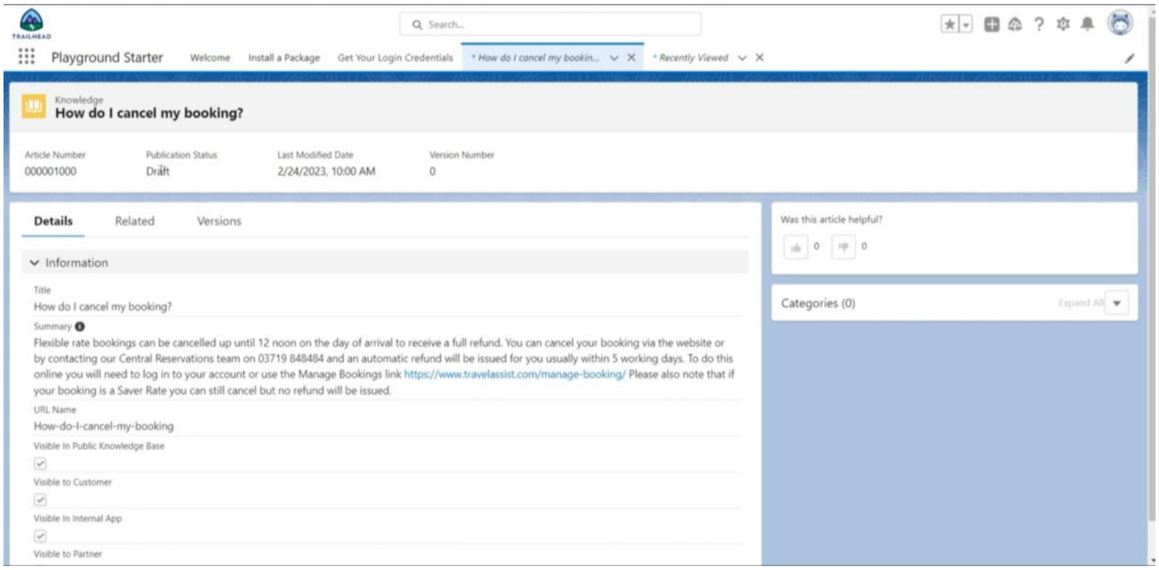
Step 2: Creating Theme



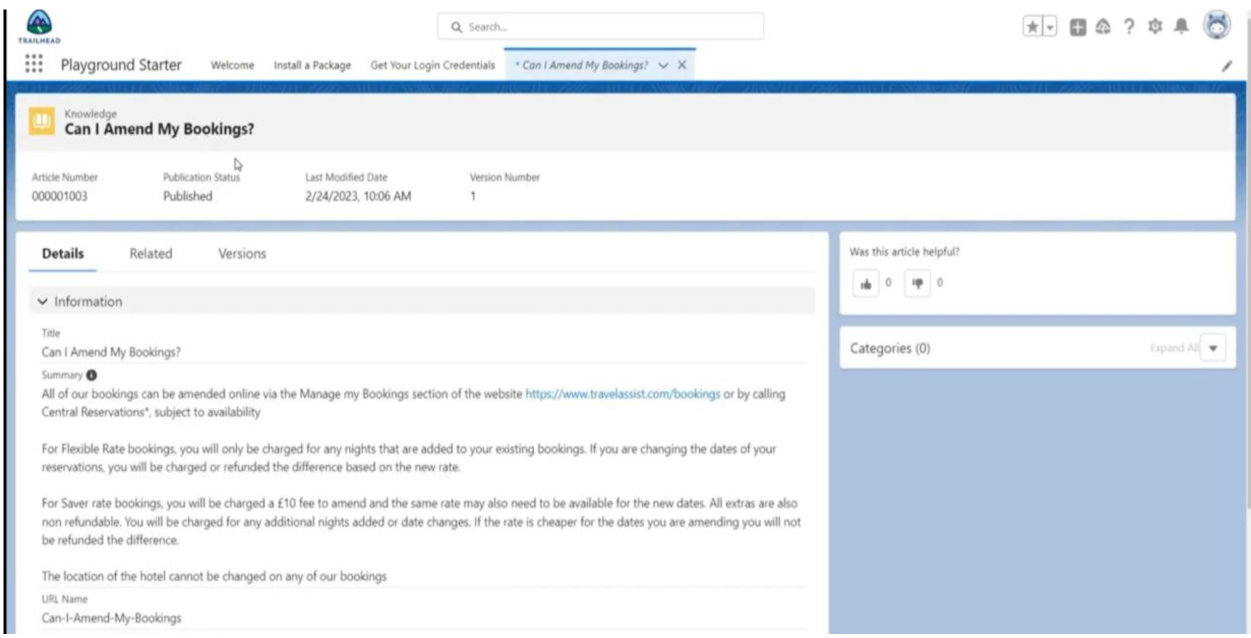
Step 3: Object Manager as knowledge



Step 4: how do I cancel Booking?



Step 5: set Can I Amend my Booking?

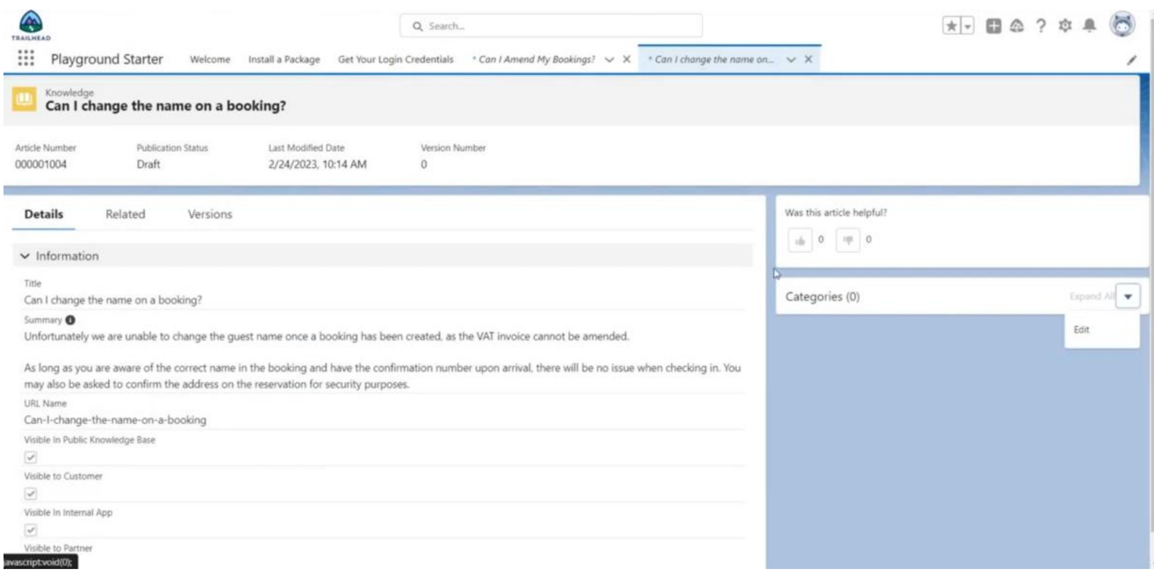


Phase 4: Theme & Branding Setup

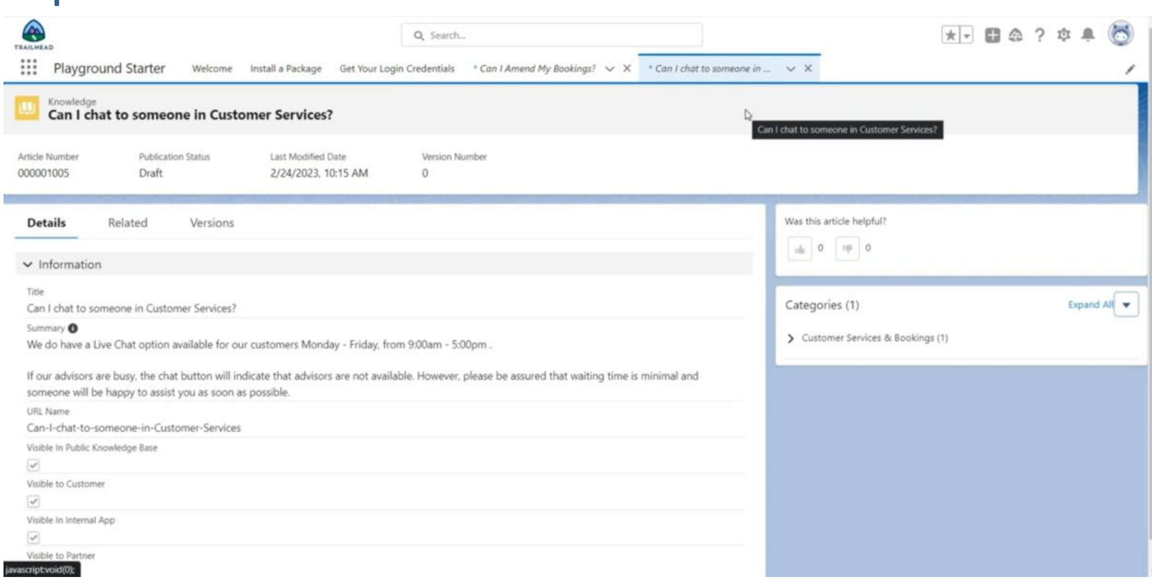
Prepared by: Yaramala Varshitha

Phase 4 focuses on establishing the theme and branding of the Salesforce Experience Cloud site. This step ensures the portal or website reflects the organization’s identity through consistent colors, logos, fonts, and layouts. It also involves setting up responsive design elements to provide an engaging experience across devices.

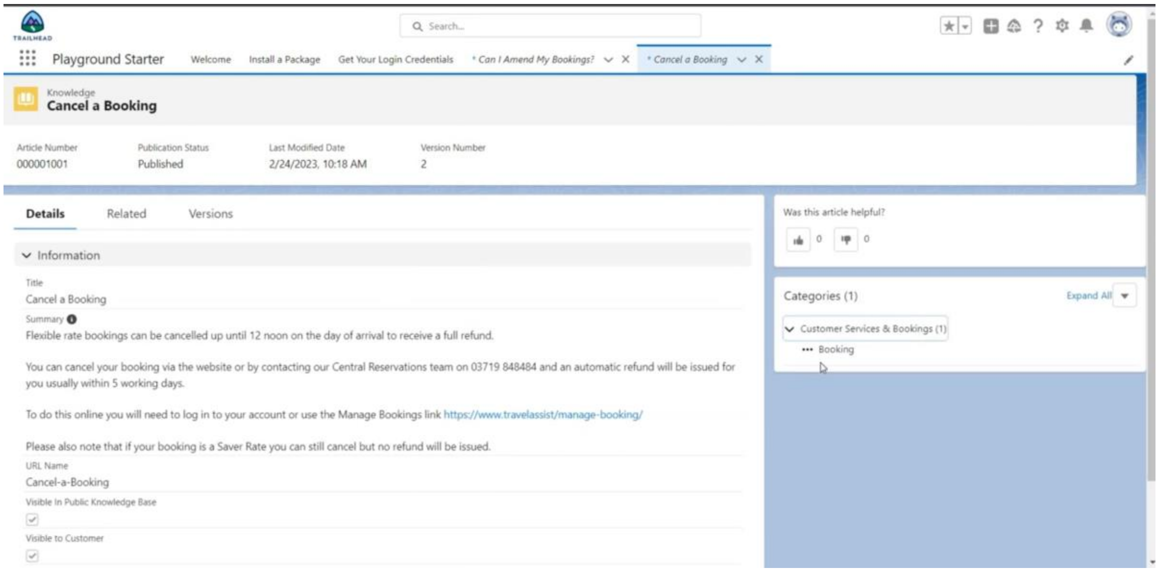
Step 1: Can I change the name on a Booking?



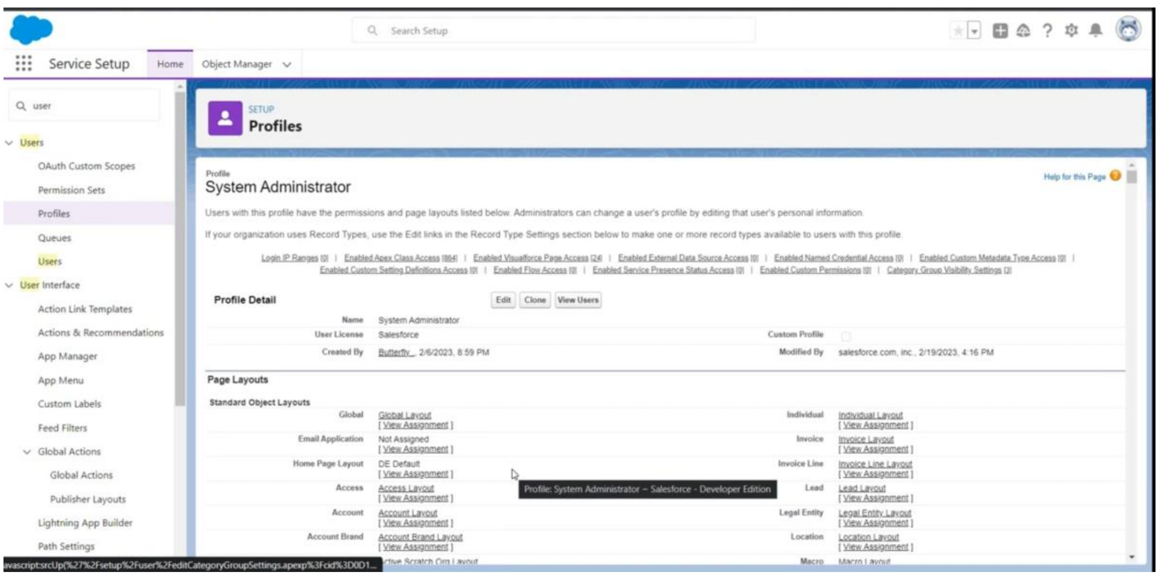
Step 2: Can I Chat to someone in Customer Services?



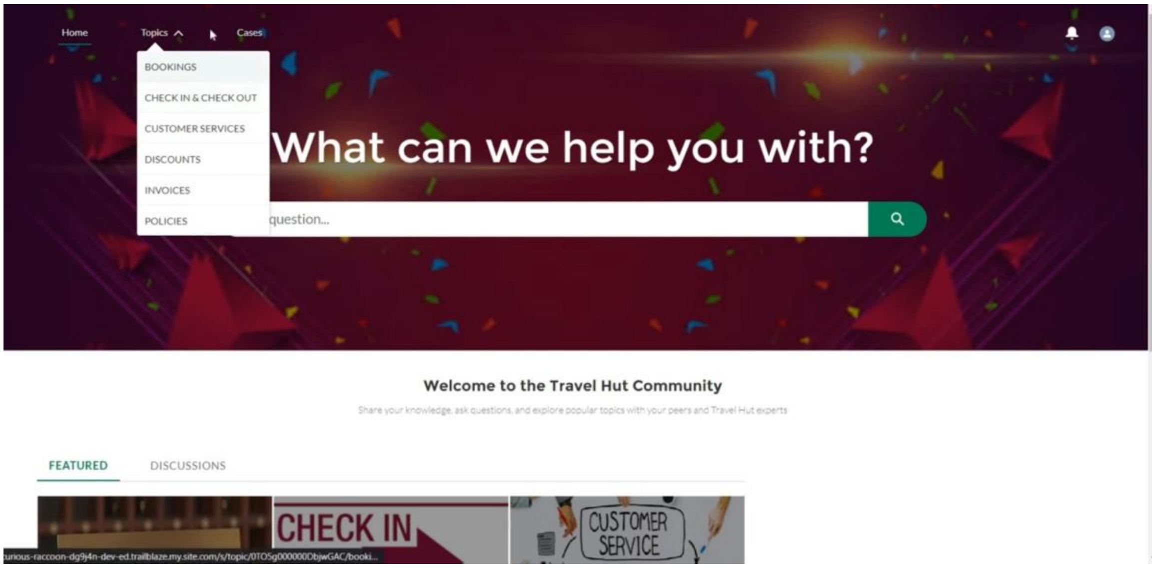
Step 3: Cancel a Booking?



Step 4: Profile -> System Administrator



Step 5: Community website Page



Phase 5: Page & Navigation Construction

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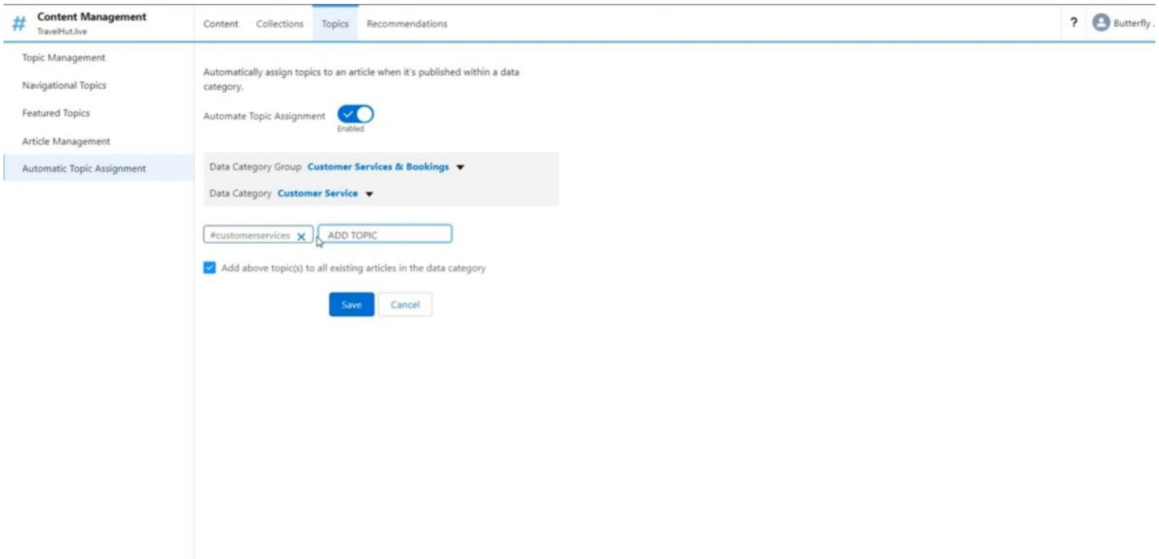
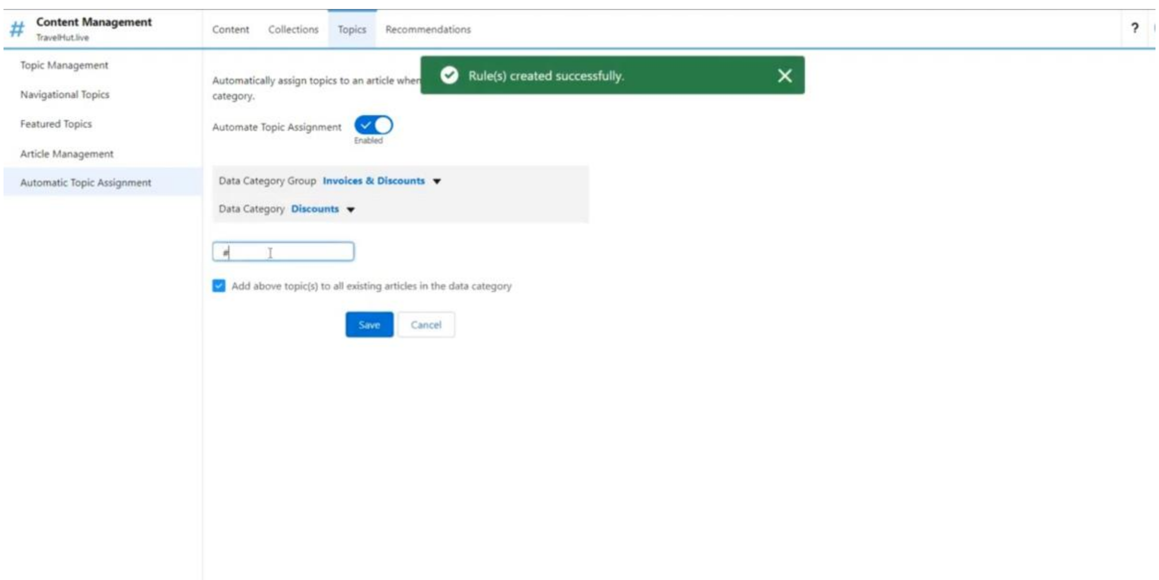
Phase 5 focuses on building the structure of the Salesforce Experience Cloud site through page creation and navigation setup. This ensures users can seamlessly move across different areas of the site while maintaining consistency and usability. Proper planning of navigation and page layouts improves user experience and accessibility.

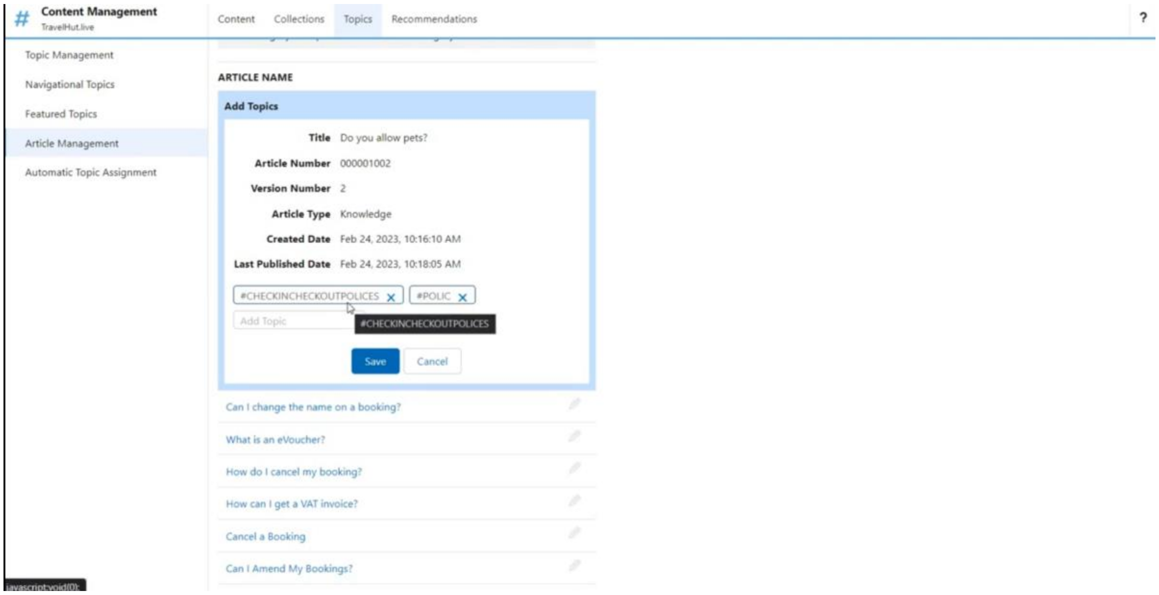
Step 1: Content management Edits



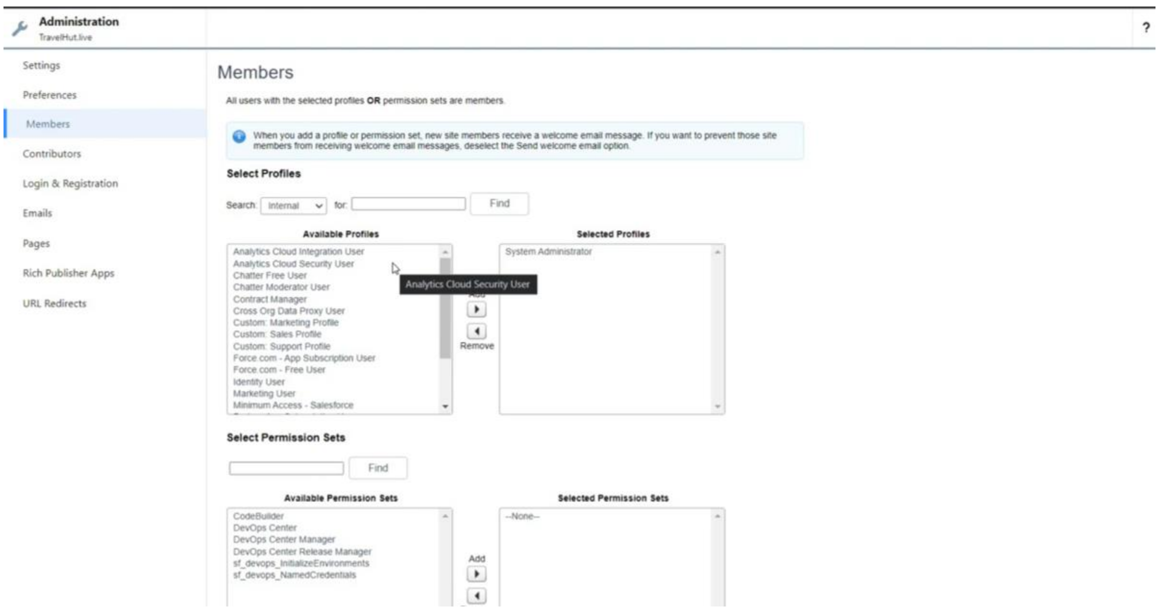
Step 2: Adding Rules for invoice



Step 3: Adding Topics to Article Management



Step 4: setup -> Adding members to Administration



Phase 6: Component Development & Customization

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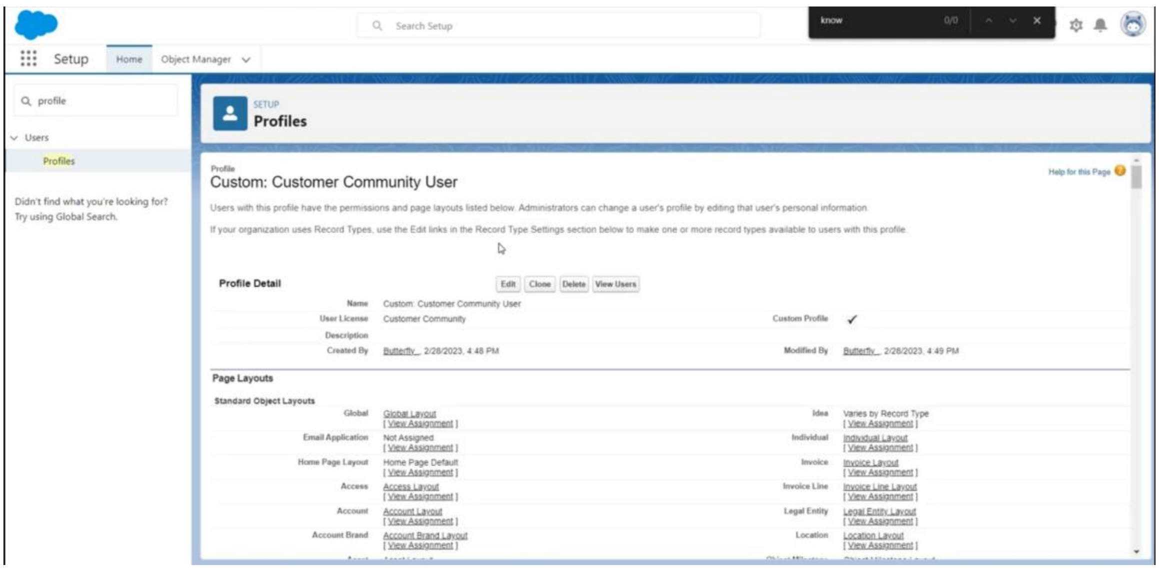
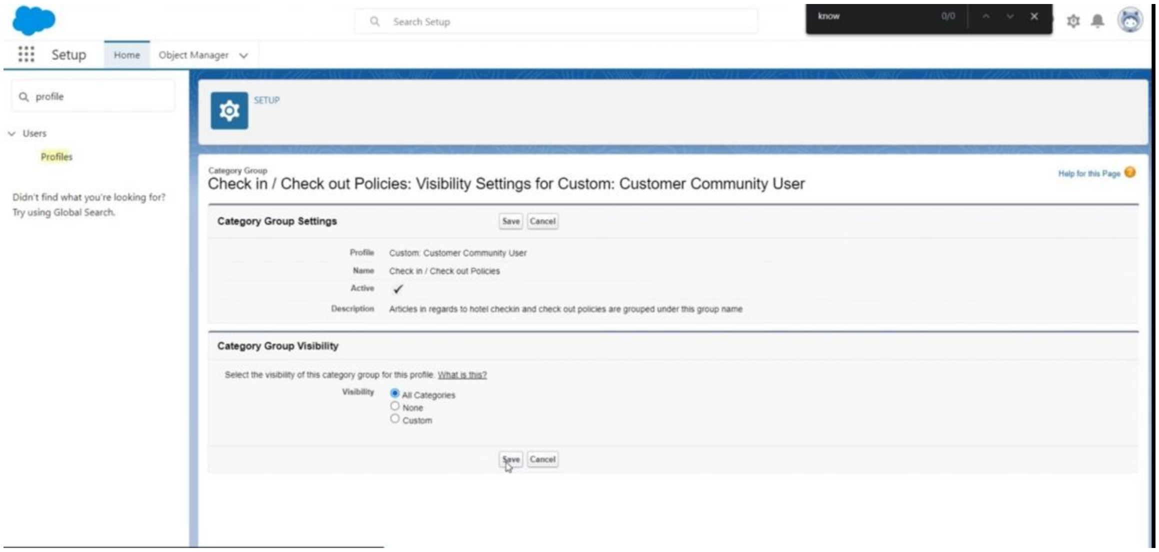
Phase 6 is dedicated to developing and customizing components within Salesforce Experience Cloud. This phase ensures that the site has the necessary functionality, combining standard components with custom-built ones where needed. Customization allows for alignment with business-specific requirements while maintaining scalability and performance.

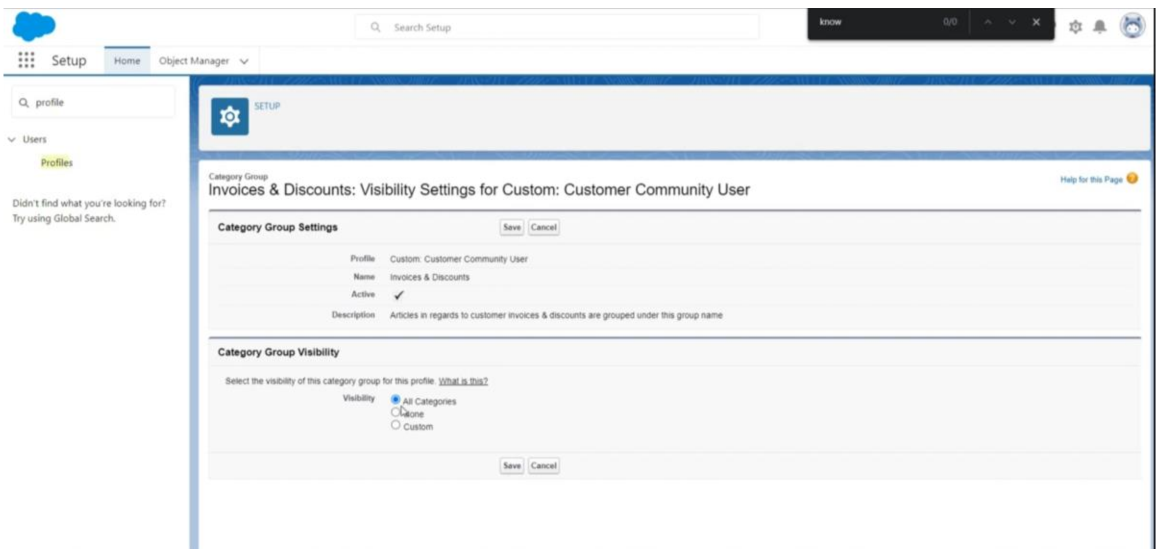
Step 1: Editing Customer Community User



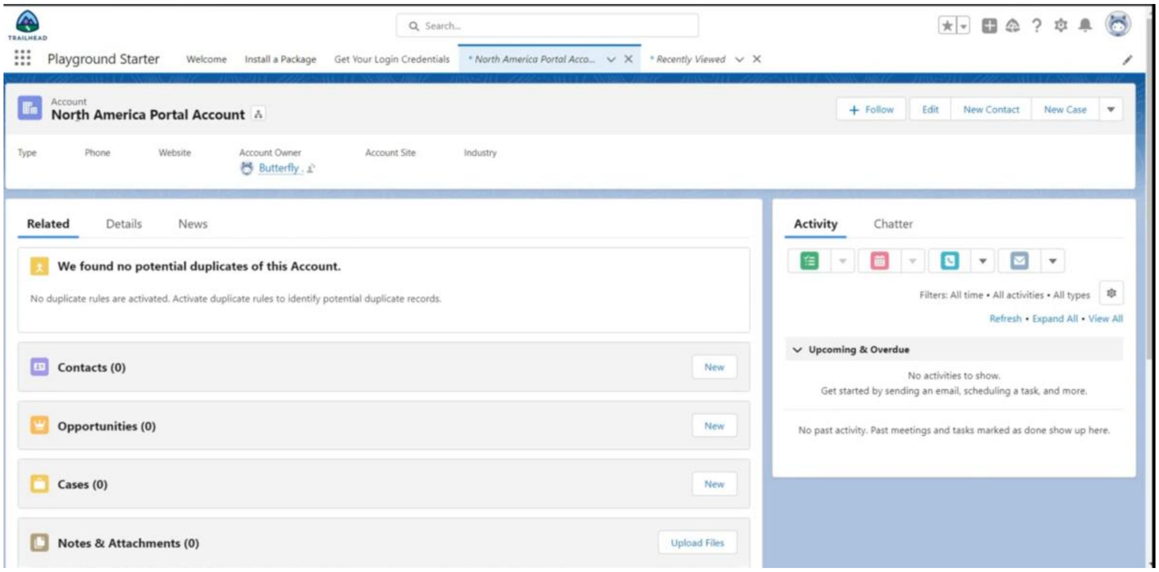
Step 2 : Editing Check In – Check – Out Policies



Step 3: Editing Invoice



Step 4: getting North American Portal account

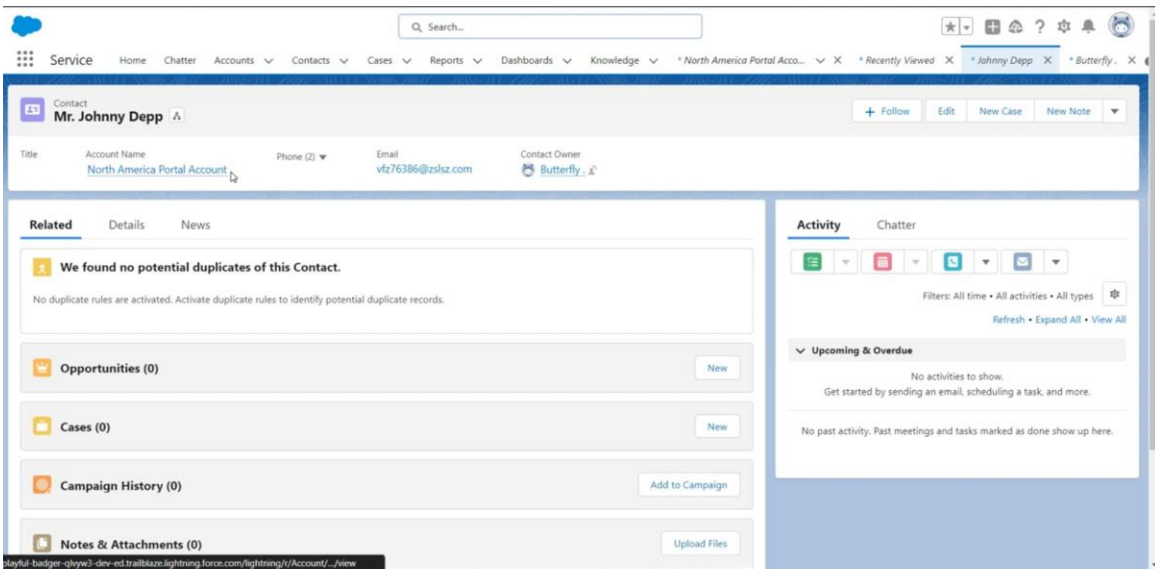


Phase 7: Security & Access Configuration

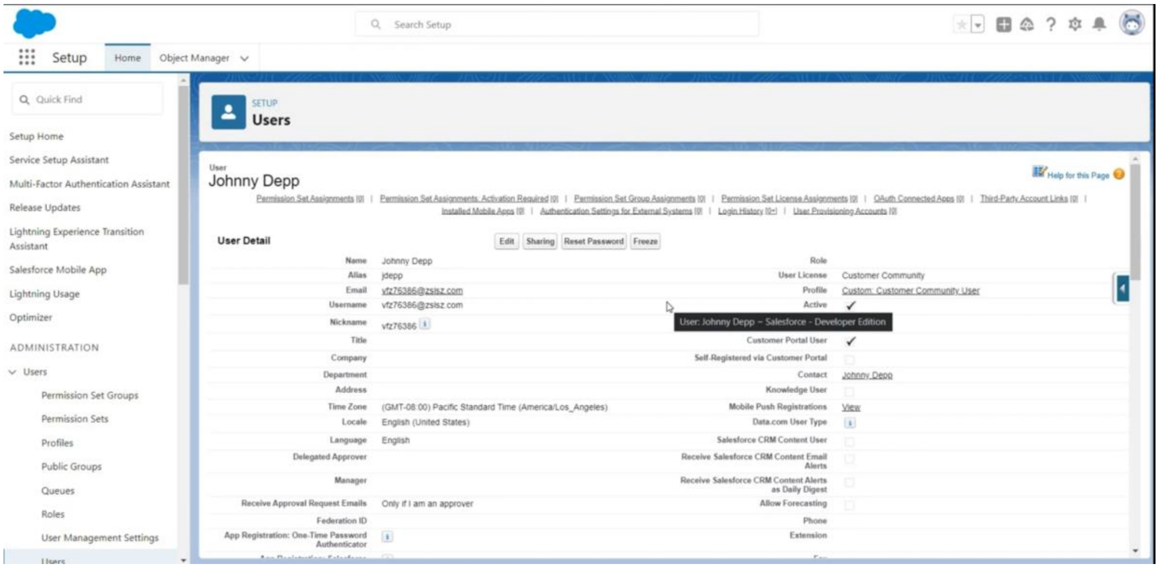
Prepared by: Yaramala Varshitha

Phase 7 focuses on configuring security and access within Salesforce Experience Cloud. This step ensures that the right users have the right level of access while protecting sensitive data. A robust security setup helps maintain trust, compliance, and overall system integrity.

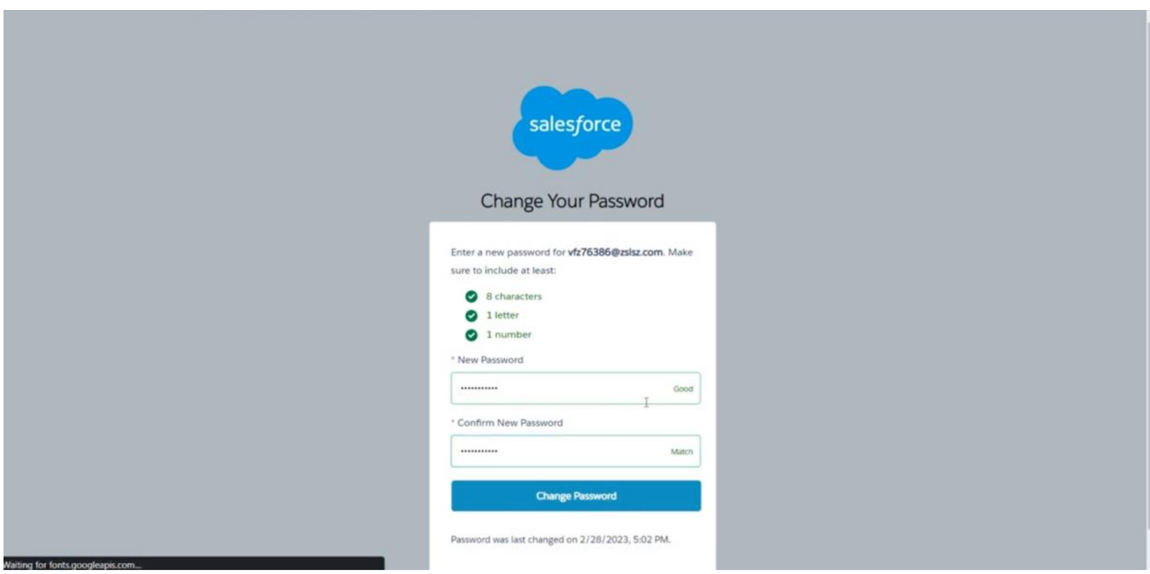
Step 1: app Launcher -> John Depp



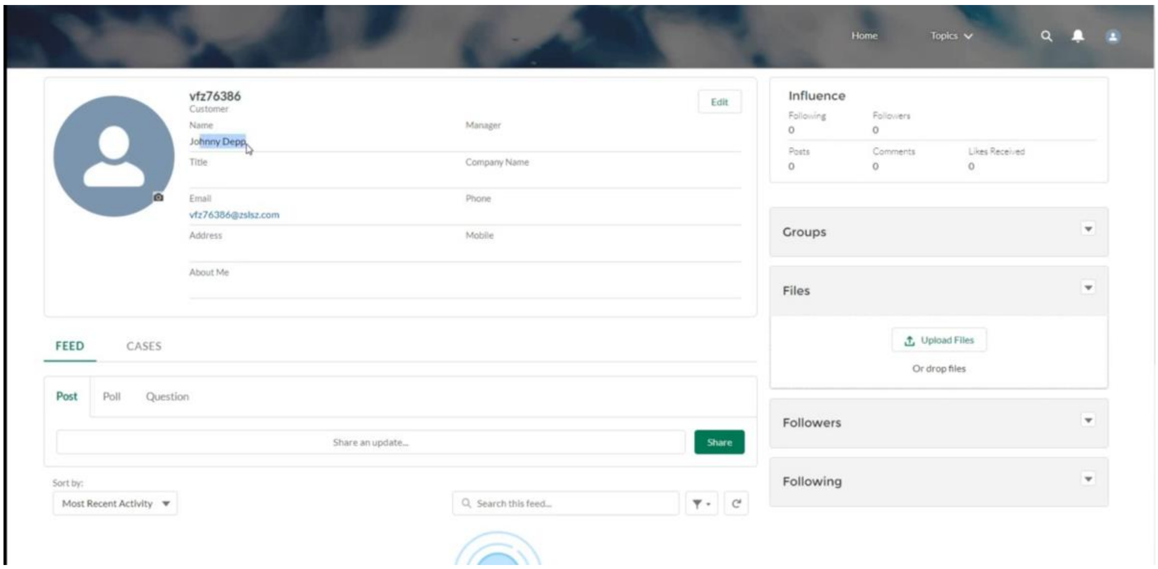
Step 2: Editing User Account Page



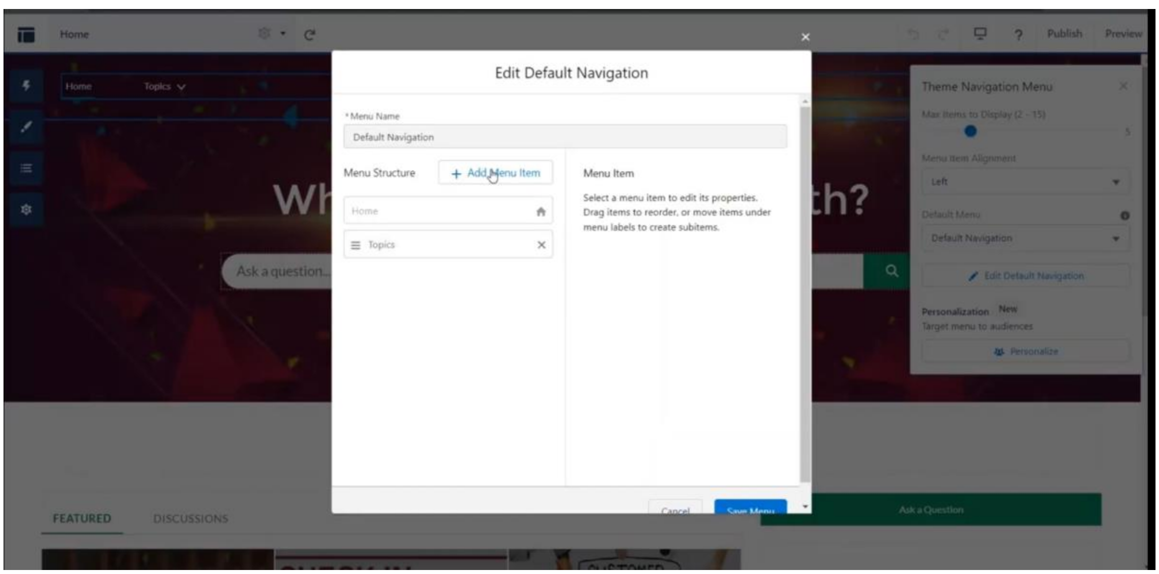
Step 3: Setting Password



Step 4: Getting Webpage



Step 5: Editing Default Navigation

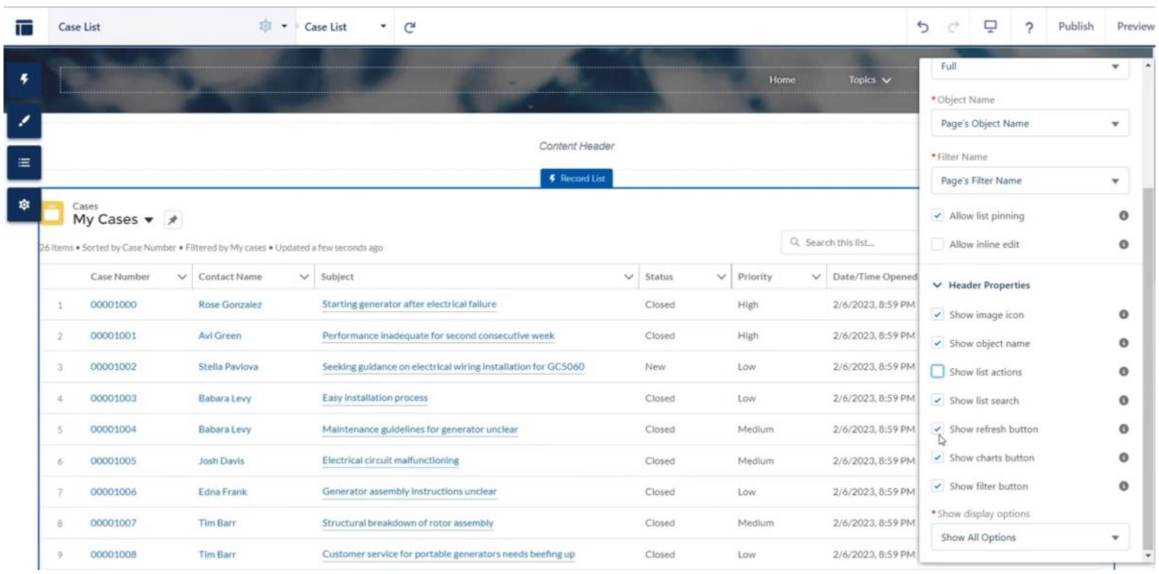


Phase 8: Content & Data Integration

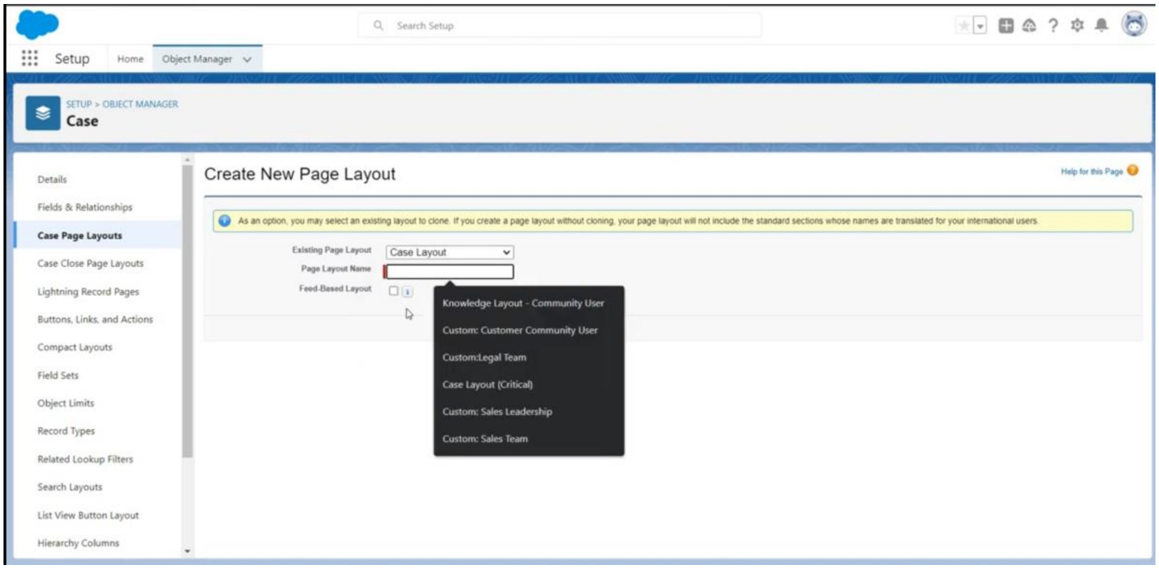
Prepared by: Yaramala Varshitha

Phase 8 focuses on integrating content and Salesforce data into the Experience Cloud site. This phase ensures that static and dynamic content, as well as CRM data, is presented effectively to users. Content and data integration is vital for providing meaningful, interactive, and personalized user experiences.

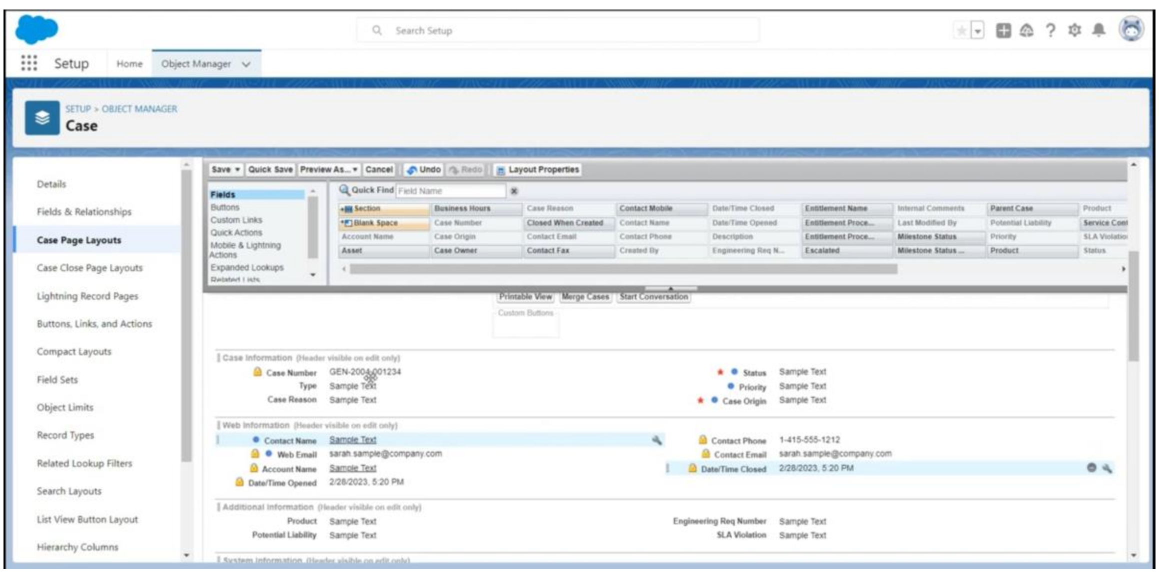
Step 1: Editing Case List



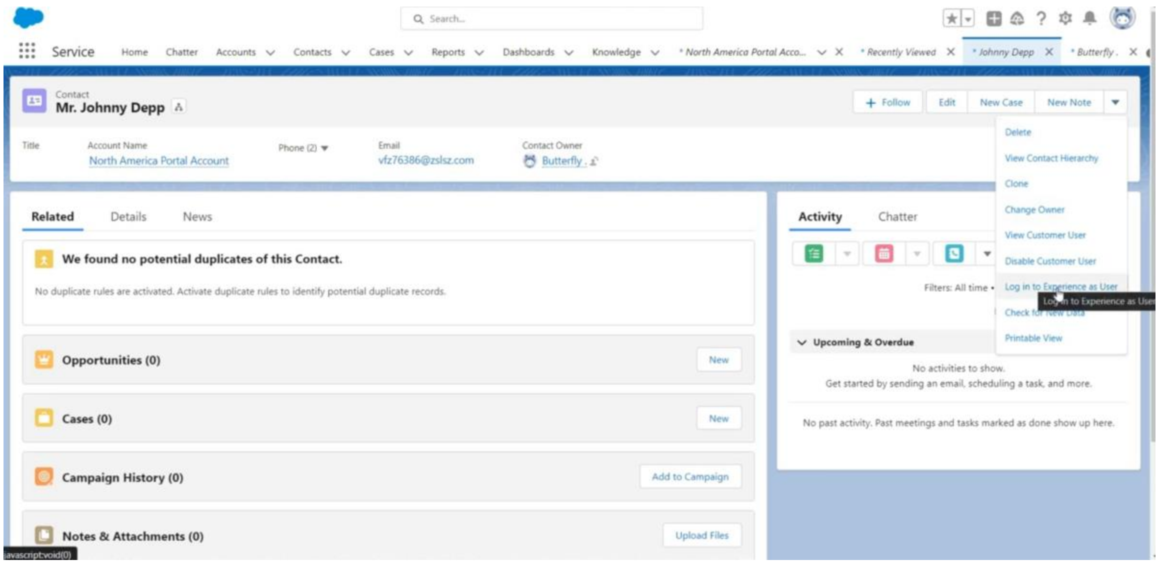
Step 2: Creating New Page Layout



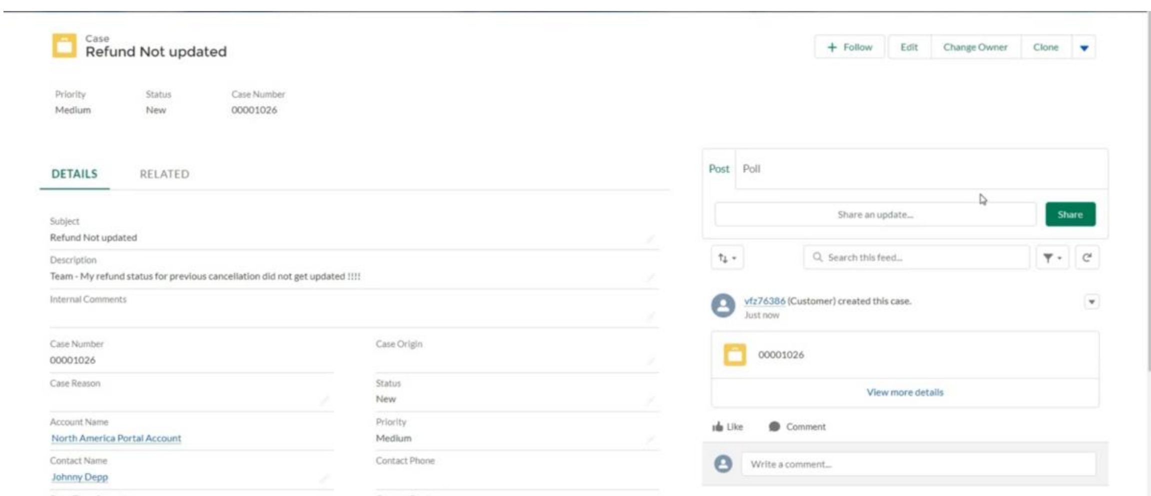
Step 3: Adding Changes To Page Layout



Step 4: Getting Contact for John Depp



Step 5: Refund Not Updated



Phase 9: Testing, QA & UAT

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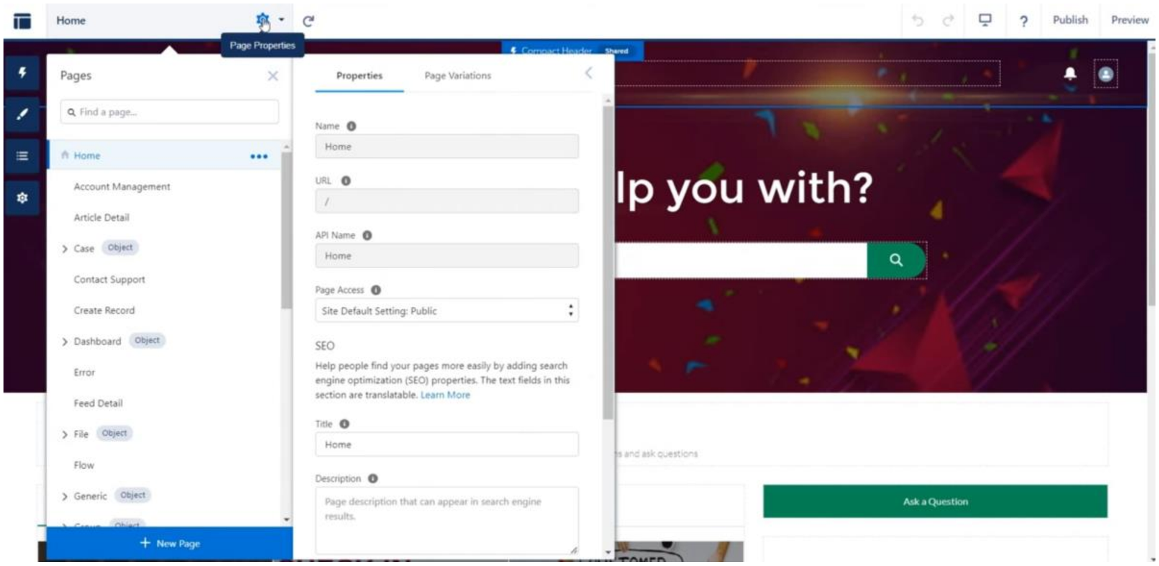
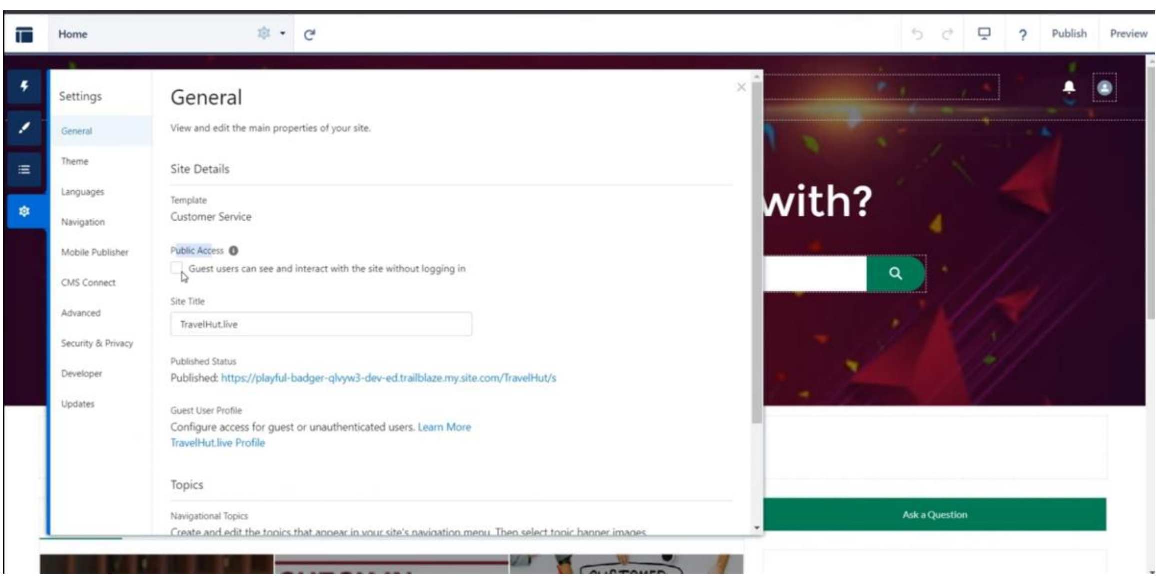
Phase 9 is dedicated to testing, quality assurance (QA), and user acceptance testing (UAT). This phase ensures that the Experience Cloud site is functioning correctly, meets requirements, and provides a secure, scalable, and user-friendly experience before final deployment.

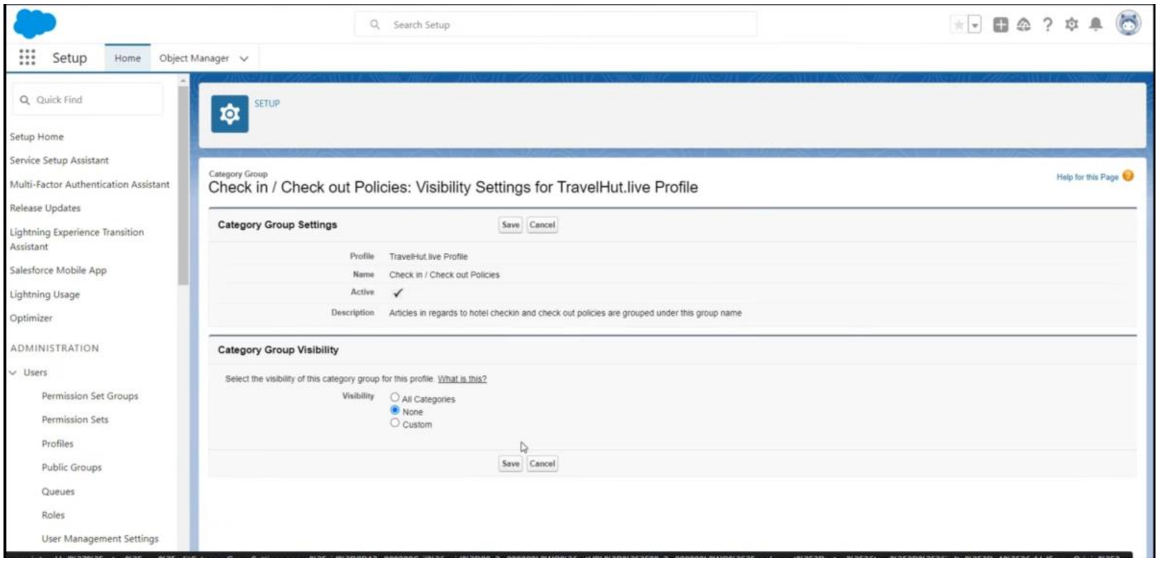
Step 1: Editing Page Properties



Step 2: Editing Public Access



Step 3: Changing Visibility Settings

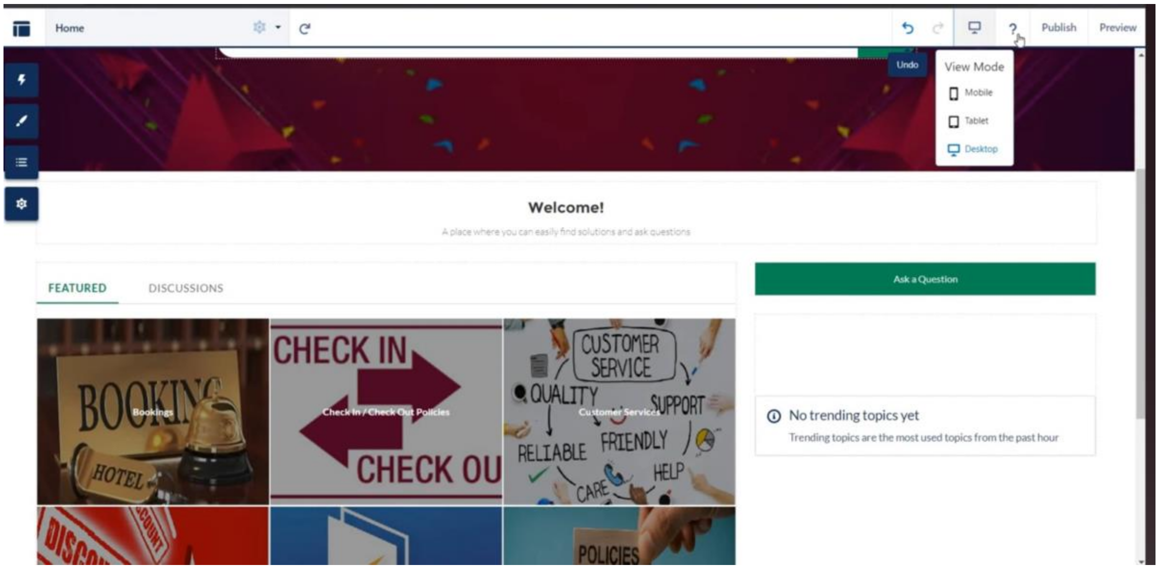


Phase 10: Deployment & Maintenance

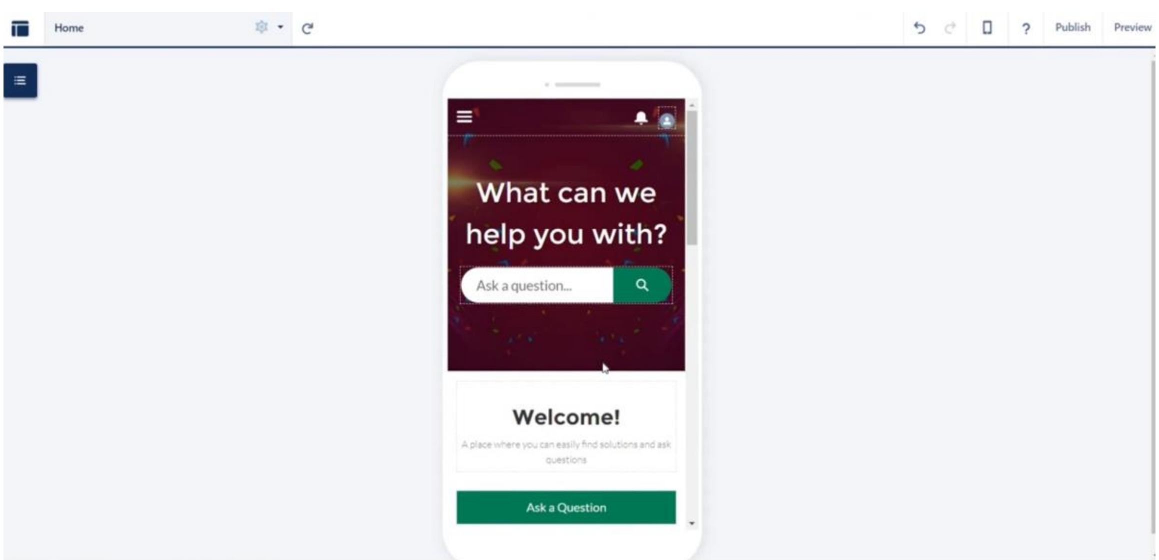
Prepared by: Yaramala Varshitha

Phase 10 is the final phase, focusing on deploying the Experience Cloud site into the production environment and establishing ongoing maintenance processes. This ensures that the site remains stable, secure, and continues to evolve with business needs after the initial launch.

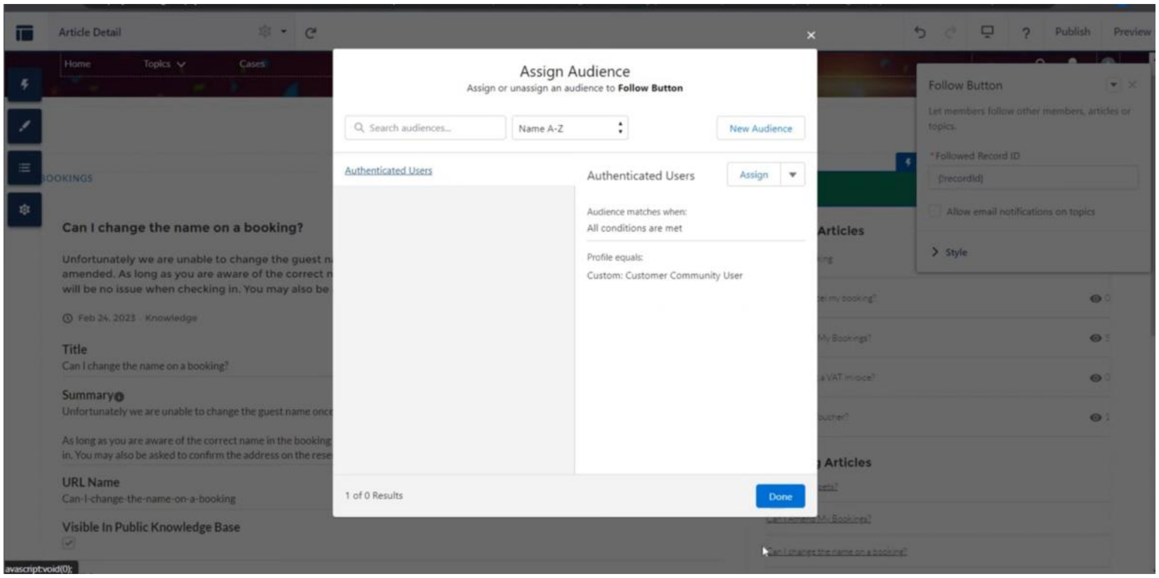
Step 1: Mobile Access



Step 2: successfully Created Mobile Access



Step 3: assigning Audience for the Webpage



Step 4: Successfully Created Page