

# Design and Development of a Customer Portal using Salesforce Experience Cloud

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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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Prepared by: Yaramala Varshitha

## 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:

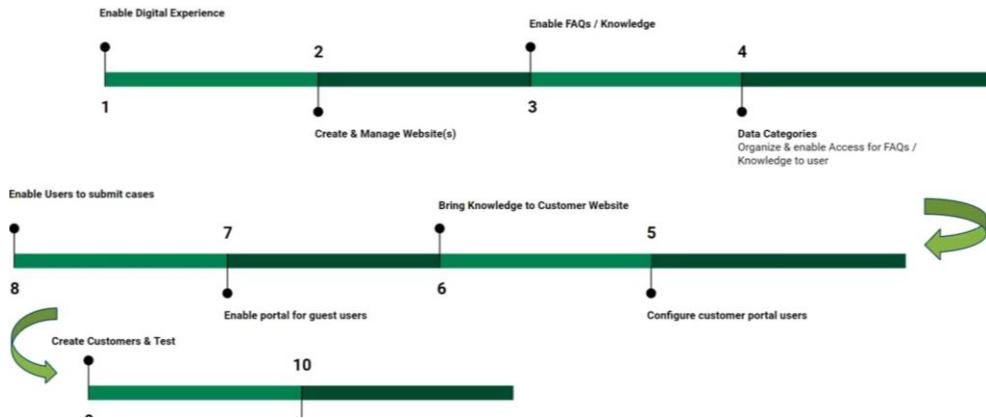
- - Healthcare: Designing portals with HIPAA-compliant access.
- - Education: Architecting student and faculty portals with learning modules.
- - Finance: Secure customer portals with role-based access to financial data.
- - Retail: Personalized portals with product recommendations and customer dashboards.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

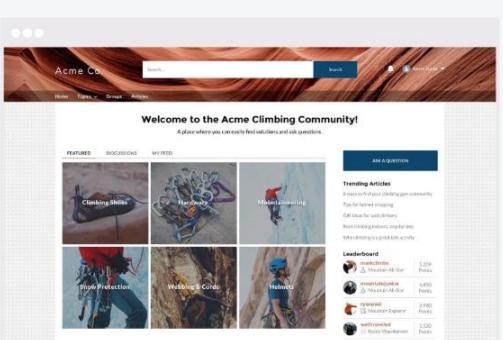
## Site Architecture

## Design Steps



## Creating of Travel hut

[← Back](#)



The screenshot shows the homepage of the Acme Climbing Community. At the top, there's a navigation bar with links for Home, Topics, Groups, and Articles. Below that is a search bar with placeholder text "Search..." and a "Search" button. The main content area features a banner with the text "Welcome to the Acme Climbing Community!" and a subtext "Ask a question where you can earn best answers and win questions." Below the banner is a grid of six images representing different climbing topics: Climbing Skills, Protection, Mountaineering, Rappelling, Protection & Cams, and Helmets. To the right of the grid is a sidebar with sections for "ASK A QUESTION" (with a link to "Ask a question"), "Trending Articles" (listing "Top tips for lead climbing", "Top 5 tools for the climbing season", "How to identify a good belay device", and "What does it mean to be a trad climber?"), and a "Leaderboard" section showing user profiles with names like "RockyRidge", "HouseCat\_HiStar", "PeteLambertson", "Dynamite\_Dave", "Pissypants", "Houser\_Espinoza", and "Trollface\_Hammerhead". At the bottom of the page are buttons for "ANSWER A QUESTION" and "CONTACT SUPPORT".

**Enter a Name**

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

Name

URL  Trailhub

## Work Space of Travel hut

### 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.

 **Guided Setup**  
Configure features and integrations with step-by-step wizard.

### Quick Links

[Experience Pulse Metrics](#)

[Lightning Carousel and Banner Components](#)

[Trailblazer Community: Experience Cloud - Best Practices Group](#)

[Set Up and Manage Experience Cloud Sites](#)

[AppExchange](#)

**Expand Your Reach with Communities**



[START LEARNING >](#)

 **Salesforce Spring '23 Release Notes**

LWR site builders can easily add links to content and layout components, and add the new LWC Flow component to a page. Large volume sites can create 10 times as many records at once. And more!

[READ THE RELEASE NOTES >](#)

# Phase 3: Environment Setup & Provisioning

Prepared by: Yaramala Varshitha

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

The screenshot shows a Knowledge Article titled "CHECK IN / CHECK OUT POLICIES". The article is categorized under "ARTICLES". It contains the following content:

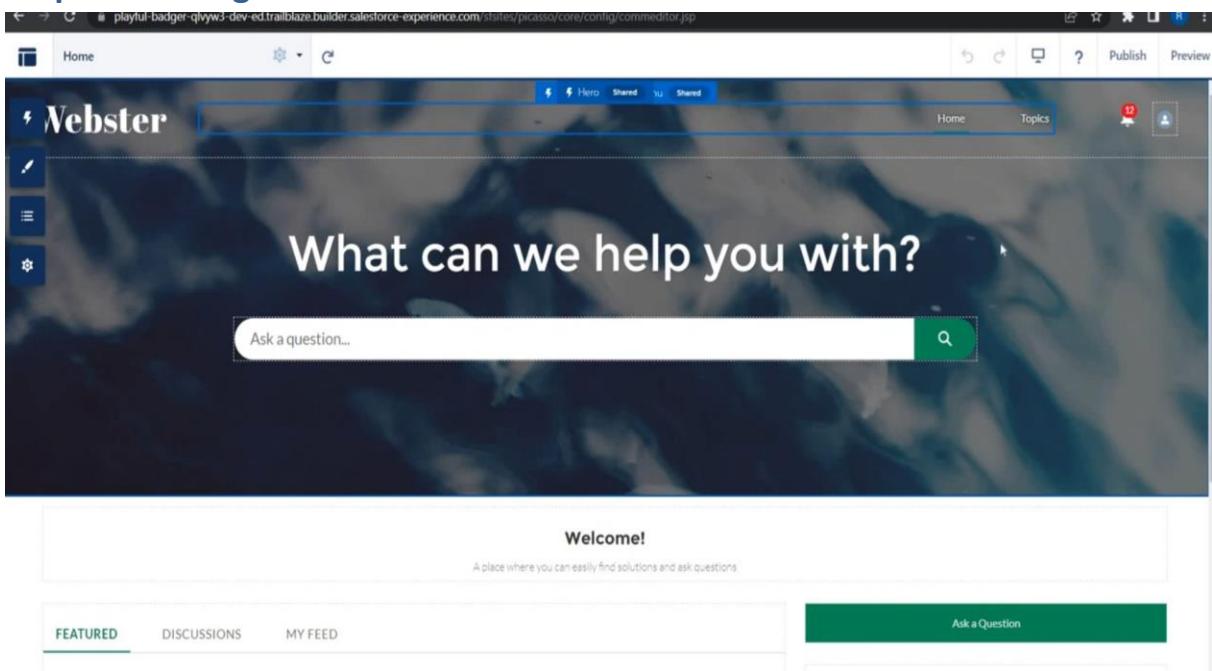
**Do you allow pets?**

We love our furry friends at TravelAssist 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 advance (by selecting the service as an extra on your...

4 Views • Dec 1, 2022 • Knowledge

Below the article, there are two green buttons: "Ask a Question" and "Follow". At the bottom of the page, there are two more buttons: "Ask a Question" and "Contact Support".

## Step 2: Creating Theme



## Step 3: Object Manager as knowledge

A screenshot of the Salesforce Setup Object Manager interface for Knowledge. The left sidebar shows various options like Details, Fields &amp; Relationships, Page Layouts (which is selected), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Communication Channel Mappings, and Triggers. The main pane shows the "Knowledge" object's page layout configuration. It includes sections for "Fields" (with a "Quick Find" search bar), "Salesforce Mobile and Lightning Experience Actions" (with a note about overriding predefined actions), and "Knowledge Detail" (with settings for "Information" like Title and URL Name). The "Fields" section displays a table with columns for Field Name, Section, Article Archived..., Article Number, Assigned By, Assignment Note, Is Latest Version, Last Modified Date, Publication Status, and URL Name. A tooltip for "Label Summary" indicates it is a System Label with a length of 1000.

## Step 4: how do I cancel Booking?

The screenshot shows a Trailhead Knowledge article titled "How do I cancel my booking?". The article details how bookings can be cancelled up to 12 noon on the day of arrival for a full refund. It provides contact information for the Central Reservations team and a link to the Manage Bookings section of the website. The article is currently in Draft status and was last modified on 2/24/2023 at 10:00 AM.

**Article Number:** 000001000  
**Publication Status:** Draft  
**Last Modified Date:** 2/24/2023, 10:00 AM  
**Version Number:** 0

**Details**   **Related**   **Versions**

**Information**

**Title:** How do I cancel my booking?  
**Summary:** Flexible rate bookings can be cancelled up to 12 noon on the day of arrival to receive a full refund. You can cancel your booking via the website or by contacting our Central Reservations team on 03719 848484 and an automatic refund will be issued for you usually within 5 working days. To do this online you will need to log in to your account or use the Manage Bookings link <https://www.travelassist.com/manage-booking/>. Please also note that if your booking is a Saver Rate you can still cancel but no refund will be issued.

**URL Name:** How-do-I-cancel-my-booking  
**Visible In Public Knowledge Base:**   
**Visible to Customer:**   
**Visible In Internal App:**   
**Visible to Partner:**

**Was this article helpful?** 0 0

**Categories (0)** **Expand All**

## Step 5: set Can I Amend my Booking?

The screenshot shows a Trailhead Knowledge article titled "Can I Amend My Bookings?". It explains that bookings can be amended online via the Manage my Bookings section of the website or by calling Central Reservations\*. The article notes that flexible rate bookings are charged for any nights added, while saver rate bookings incur a £10 fee to amend. It also states that hotel locations cannot be changed.

**Article Number:** 000001003  
**Publication Status:** Published  
**Last Modified Date:** 2/24/2023, 10:06 AM  
**Version Number:** 1

**Details**   **Related**   **Versions**

**Information**

**Title:** Can I Amend My Bookings?  
**Summary:** All of our bookings can be amended online via the Manage my Bookings section of the website <https://www.travelassist.com/bookings> 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 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.

**URL Name:** Can-I-Amend-My-Bookings

**Was this article helpful?** 0 0

**Categories (0)** **Expand All**

# 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?

The screenshot shows a Salesforce Knowledge article titled "Can I change the name on a booking?". The article details that changing the guest name once a booking is created is not possible due to VAT invoice constraints. It provides a note about checking in with the correct name and a confirmation number. The article is set to Draft status and was last modified on 2/24/2023 at 10:14 AM. It has 0 versions. The sidebar includes a "Was this article helpful?" section with 0 upvotes and 0 downvotes, and a "Categories" section showing 0 categories.

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

The screenshot shows a Salesforce Knowledge article titled "Can I chat to someone in Customer Services?". It informs users that live chat is available Monday-Friday from 9:00am-5:00pm. If advisors are busy, the chat button indicates unavailability, but wait time is minimal. The article is set to Draft status and was last modified on 2/24/2023 at 10:15 AM. It has 0 versions. The sidebar includes a "Was this article helpful?" section with 0 upvotes and 0 downvotes, and a "Categories" section showing 1 category: "Customer Services & Bookings (1)".

## Step 3: Cancel a Booking?

The screenshot shows a Salesforce Knowledge Article titled "Cancel a Booking". The article details how bookings can be cancelled up to 12 noon on the day of arrival. It includes a URL link for managing bookings and notes that a Saver Rate booking can still be cancelled. The article is categorized under "Customer Services & Bookings" and "Booking".

**Article Details:**

- Article Number: 000001001
- Publication Status: Published
- Last Modified Date: 2/24/2023, 10:18 AM
- Version Number: 2

**Information:**

Title: Cancel a Booking  
Summary: Flexible rate bookings can be cancelled up until 12 noon on the day of arrival to receive a full refund.  
Content: You can cancel your booking via the website or by contacting our Central Reservations team on 03719 848484 and an automatic refund will be issued for you usually within 5 working days.  
URL Name: Cancel-a-Booking  
Visible In Public Knowledge Base: Yes  
Visible To Customer: Yes

**Feedback:** Was this article helpful? 0 likes, 0 dislikes.

**Categories:** Customer Services & Bookings (1) > Booking

## Step 4: Profile -> System Administrator

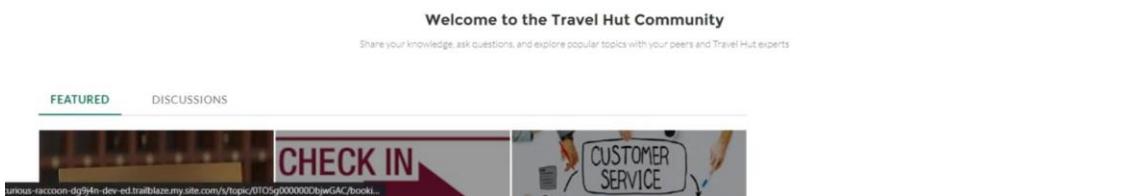
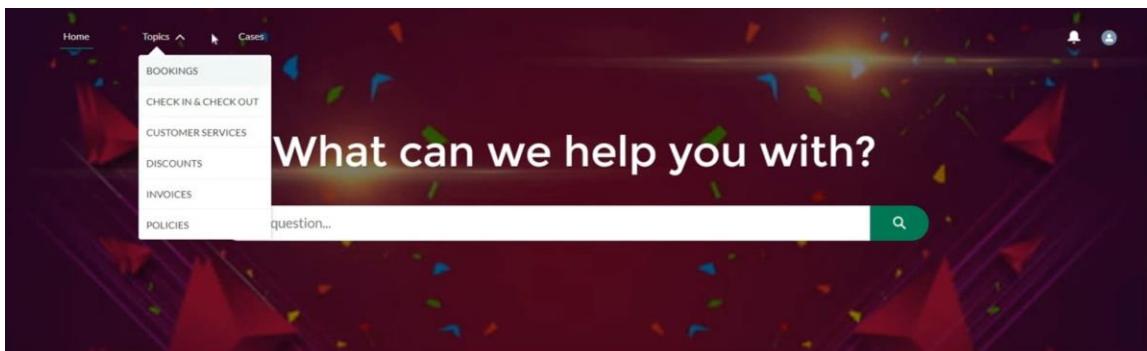
The screenshot shows the Salesforce Setup interface under "Service Setup". The left sidebar is expanded to show "User Interface" and "Profiles". The main content area displays the "System Administrator" profile. The profile details include:  
Name: System Administrator  
User License: Salesforce  
Created By: Butterfly\_ (2/6/2023, 8:59 PM)  
Custom Profile: (None)  
Modified By: salesforce.com, inc. (2/19/2023, 4:16 PM)

**Page Layouts:**

Standard Object Layouts	Global	Individual
Global Layout	[View Assignment]	[View Assignment]
Email Application	Not Assigned	[View Assignment]
Home Page Layout	DE Default	[View Assignment]
Access	Access Layout	[View Assignment]
Account	Account Layout	[View Assignment]
Account Brand	Account Brand Layout	[View Assignment]

Other sections visible in the setup sidebar include "Object Manager", "OAuth Custom Scopes", "Permission Sets", "Profiles", "Queues", "Users", "User Interface", "Action Link Templates", "Actions & Recommendations", "App Manager", "App Menu", "Custom Labels", "Feed Filters", "Global Actions", "Publisher Layouts", "Lightning App Builder", and "Path Settings".

## Step 5: Community website Page



# Phase 5: Page & Navigation Construction

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Prepared by: Yaramala Varshitha

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

The screenshot shows the 'Content Management' interface for 'TravelHut.live'. The 'Topics' tab is selected. Under 'Automatic Topic Assignment', the 'Enabled' switch is turned on. A dropdown menu shows 'Data Category Group: Customer Services & Bookings' and 'Data Category: Customer Service'. A search bar contains '#customerservices' and an 'ADD TOPIC' button. A checkbox is checked with the text 'Add above topic(s) to all existing articles in the data category'. At the bottom are 'Save' and 'Cancel' buttons.

## Step 2: Adding Rules for invoice

The screenshot shows the 'Content Management' interface for 'TravelHut.live'. The 'Topics' tab is selected. Under 'Automatic Topic Assignment', the 'Enabled' switch is turned on. A green success message box displays 'Rule(s) created successfully.' A dropdown menu shows 'Data Category Group: Invoices & Discounts' and 'Data Category: Discounts'. A search bar contains '# invoices' and an 'ADD TOPIC' button. A checkbox is checked with the text 'Add above topic(s) to all existing articles in the data category'. At the bottom are 'Save' and 'Cancel' buttons.

## Step 3: Adding Topics to Article Management

The screenshot shows the Content Management interface for TravelHutLive. The left sidebar has a tree view with 'Topic Management', 'Navigational Topics', 'Featured Topics', 'Article Management' (which is selected), and 'Automatic Topic Assignment'. The main area shows an article titled 'Do you allow pets?'. The 'ARTICLE NAME' section includes fields for 'Title' (Do you allow pets?), 'Article Number' (000001002), 'Version Number' (2), 'Article Type' (Knowledge), 'Created Date' (Feb 24, 2023, 10:16:10 AM), and 'Last Published Date' (Feb 24, 2023, 10:18:05 AM). Below these are two topic tags: '#CHECKINCHECKOUTPOLICIES' and '#POLIC'. A modal window titled 'Add Topics' is open, showing the same article details and the selected topics. At the bottom of the modal are 'Save' and 'Cancel' buttons.

## Step 4: setup -> Adding members to Administration

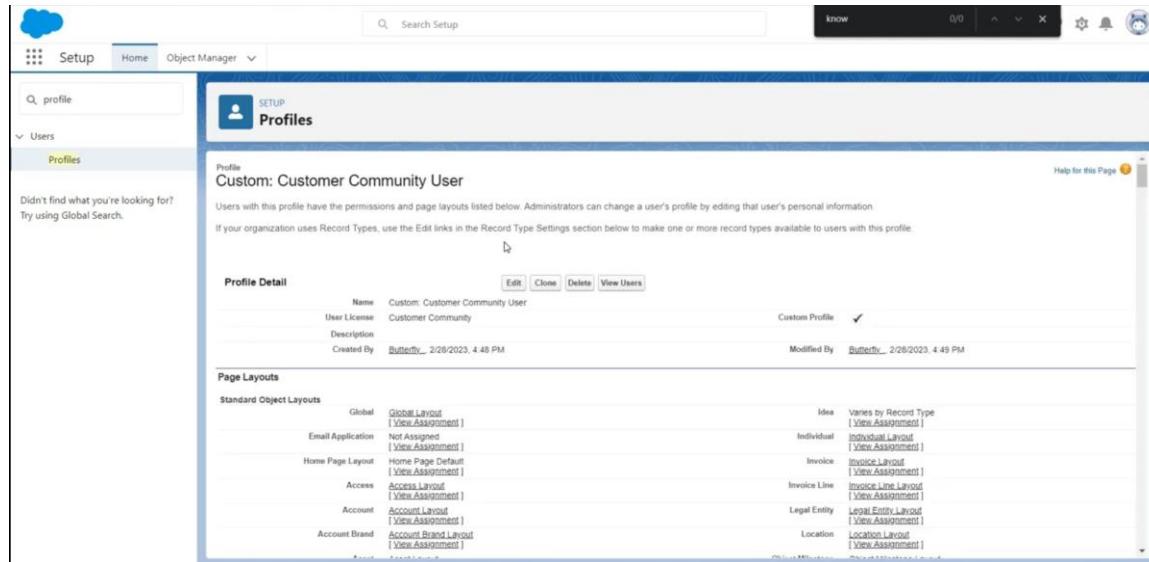
The screenshot shows the Administration interface for TravelHutLive. The left sidebar lists 'Settings', 'Preferences', 'Members' (which is selected), 'Contributors', 'Login & Registration', 'Emails', 'Pages', 'Rich Publisher Apps', and 'URL Redirects'. The main area is titled 'Members' and contains a note: 'All users with the selected profiles OR permission sets are members.' It also includes a note about preventing welcome email messages for new site members. Below this is a 'Select Profiles' section with 'Available Profiles' (including Analytics Cloud Integration User, Analytics Cloud Security User, Chatter Free User, Chatter Moderator User, Contract Manager, Cross Org Data Proxy User, Custom Marketing Profile, Custom Object Profile, Custom Support Profile, Force.com - App Subscription User, Force.com - Free User, Identity User, Marketing User, Minimum Access - Salesforce) and 'Selected Profiles' (System Administrator). There is also a 'Select Permission Sets' section with 'Available Permission Sets' (CodeBuilder, DevOps Center, DevOps Center Manager, DevOps Center Release Manager, sf\_devops\_InitializeEnvironments, sf\_devops\_NamedCredentials) and 'Selected Permission Sets' (None).

# Phase 6: Component Development & Customization

Prepared by: Yaramala Varshitha

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

The screenshot shows the Salesforce Setup interface. The left sidebar has 'Setup' selected. Under 'Users', 'Profiles' is expanded. A search bar at the top says 'Search Setup'. The main content area is titled 'Category Group Check in / Check out Policies: Visibility Settings for Custom: Customer Community User'. It shows 'Category Group Settings' with a 'Profile' of 'Custom: Customer Community User', 'Name' as 'Check in / Check out Policies', 'Active' checked, and a 'Description' of 'Articles in regards to hotel checkin and checkout policies are grouped under this group name'. Below this is a 'Category Group Visibility' section with 'Visibility' set to 'All Categories' (radio button selected). At the bottom are 'Save' and 'Cancel' buttons.

## Step 3: Editing Invoice

The screenshot shows the Salesforce Setup interface. The left sidebar has 'Setup' selected. Under 'Users', 'Profiles' is expanded. A search bar at the top says 'Search Setup'. The main content area is titled 'Category Group Invoices & Discounts: Visibility Settings for Custom: Customer Community User'. It shows 'Category Group Settings' with a 'Profile' of 'Custom: Customer Community User', 'Name' as 'Invoices & Discounts', 'Active' checked, and a 'Description' of 'Articles in regards to customer invoices & discounts are grouped under this group name'. Below this is a 'Category Group Visibility' section with 'Visibility' set to 'All Categories' (radio button selected). At the bottom are 'Save' and 'Cancel' buttons.

## Step 4: getting North American Portal account

The screenshot shows the Salesforce interface for a 'North America Portal Account'. At the top, there's a navigation bar with links for 'Playground Starter', 'Welcome', 'Install a Package', 'Get Your Login Credentials', and 'Recently Viewed'. Below the navigation is a header bar with a search field, followed by a toolbar with icons for 'Follow', 'Edit', 'New Contact', 'New Case', and other options.

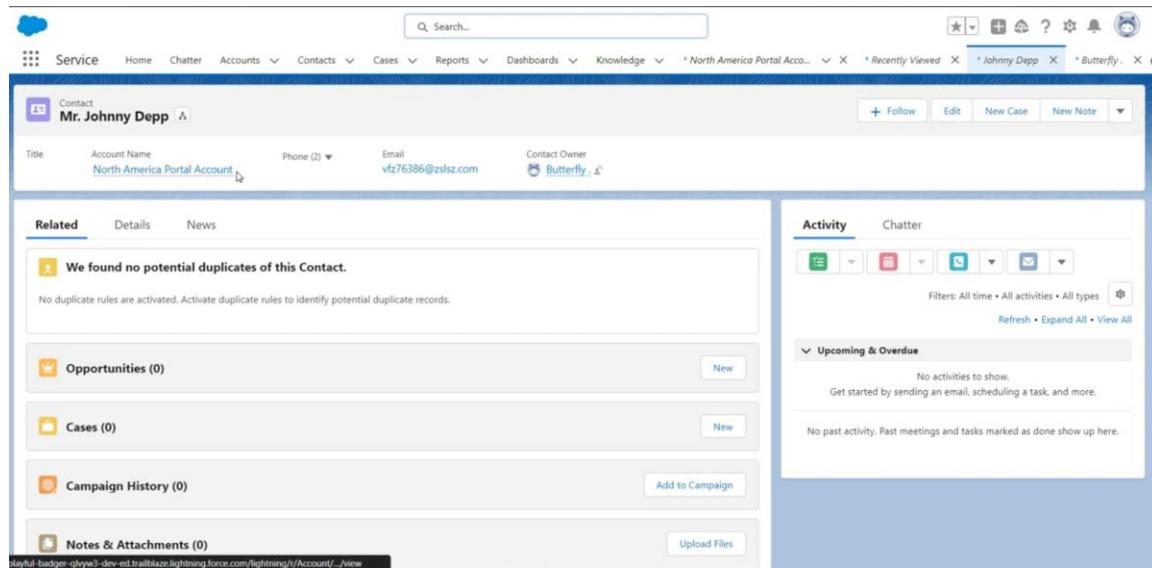
The main content area displays the account details for 'North America Portal Account'. It includes fields for 'Type' (Phone), 'Website', 'Account Owner' (Butterfly), 'Account Site', and 'Industry'. A message box states: 'We found no potential duplicates of this Account.' Below this, there are sections for 'Contacts (0)', 'Opportunities (0)', 'Cases (0)', and 'Notes & Attachments (0)'. On the right side, there are sections for 'Activity' and 'Chatter', both of which are currently empty.

# 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

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. On the left, there's a sidebar with various setup categories like 'Setup Home', 'Service Setup Assistant', and 'ADMINISTRATION' which is expanded to show 'Users' and other sub-options. The main area displays the 'User Detail' for a user named 'Johnny Depp'. In the 'Role' section, 'Customer Community' is listed under 'User License' and 'Profile'. A tooltip for 'Customer Portal User' is displayed, showing it's checked. Other settings shown include 'Active', 'Nickname', 'Title', 'Company', 'Department', 'Address', 'Time Zone', 'Locale', 'Language', 'Delegated Approver', 'Manager', 'Receive Approval Request Emails', 'Federation ID', and 'App Registration: One-Time Password Authenticator'. The status bar at the bottom indicates 'Last Published: 2/28/2023 5:02 PM'.

## Step 3: Setting Password

The screenshot shows the 'Change Your Password' page. At the top, it says 'Change Your Password'. Below that, it asks to enter a new password for 'vtz76386@zslsz.com' and provides instructions: 'Enter a new password for vtz76386@zslsz.com. Make sure to include at least:'. It lists three requirements with green checkmarks: '8 characters', '1 letter', and '1 number'. There are two input fields: one for 'New Password' containing '\*\*\*\*\*' and another for 'Confirm New Password' containing '\*\*\*\*\*'. Both fields have 'Good' and 'Match' feedback respectively. A large blue 'Change Password' button is centered below the fields. At the bottom, a message says 'Password was last changed on 2/28/2023, 5:02 PM.' A status bar at the bottom left says 'Waiting for fonts.googleapis.com...'.

## Step 4: Getting Webpage

This screenshot shows a user profile page. At the top, there's a blue circular profile picture placeholder. Below it, the profile ID 'vfz76386' and the title 'Customer'. The name 'Johnny Depp' is listed under 'Name'. To the right, there are sections for 'Manager', 'Company Name', 'Phone', and 'Mobile'. Below these fields is a large text area labeled 'About Me'. On the left side of the main content area, there are tabs for 'FEED' (which is selected) and 'CASES'. Under 'FEED', there are buttons for 'Post', 'Poll', and 'Question'. A text input field says 'Share an update...' with a 'Share' button next to it. Below this is a 'Sort by:' dropdown set to 'Most Recent Activity'. On the right side, there are several boxes: 'Influence' (Following 0, Followers 0, Posts 0, Comments 0, Likes Received 0), 'Groups' (a dropdown menu), 'Files' (with a 'Upload Files' button), 'Followers' (a dropdown menu), and 'Following' (a dropdown menu). At the very bottom of the page, there's a decorative graphic of a rainbow.

## Step 5: Editing Default Navigation

This screenshot shows the 'Edit Default Navigation' dialog box open over a dark-themed web interface. The dialog has a header 'Edit Default Navigation' and a sub-header 'Default Navigation'. It includes a 'Menu Name' field with 'Default Navigation' selected. Below this is a 'Menu Structure' section with a tree view showing 'Home' and 'Topics'. An 'Add Menu Item' button is available. To the right, there's a 'Menu Item' section with instructions to select a menu item for properties, reorder items, or create subitems. On the far right, there's a sidebar titled 'Theme Navigation Menu' with settings for 'Max items to Display (2 - 15)', 'Menu Item Alignment (Left)', 'Default Menu (Default Navigation)', and a 'Personalization' section. At the bottom of the dialog, there are 'Cancel' and 'Save Menu' buttons, along with a 'Personalize' button in the sidebar.

# Phase 8: Content & Data Integration

Prepared by: Yaramala Varshitha

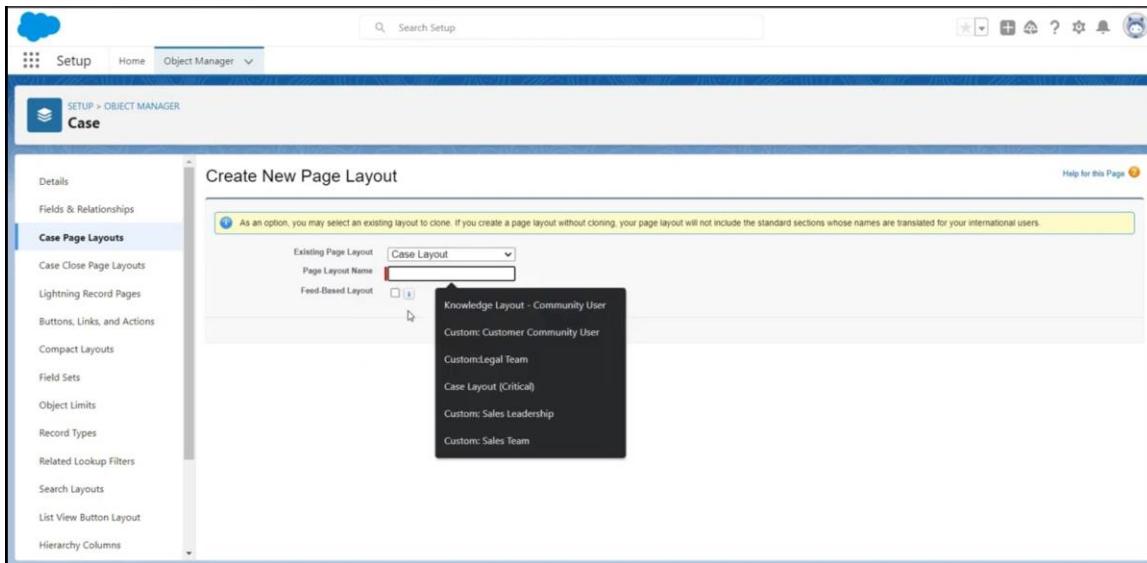
Phase 8 focuses on integrating content and Salesforce data into the Experience Cloud site. This phase ensures that static and dynamic content, as well as CRM data, is presented effectively to users. Content and data integration is vital for providing meaningful, interactive, and personalized user experiences.

## Step 1: Editing Case List

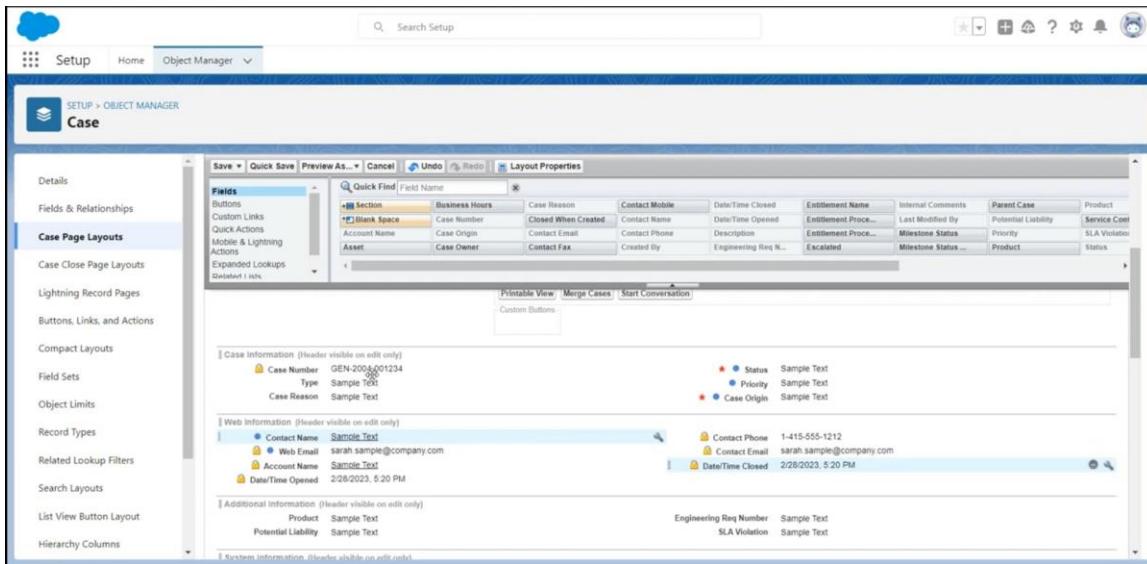
The screenshot shows the Experience Cloud interface for managing cases. On the left, there's a sidebar with icons for Cases, My Cases, and a search bar. The main area displays a table titled 'Case List' with columns: Case Number, Contact Name, Subject, Status, Priority, and Date/Time Opened. The table contains 9 rows of case data. To the right of the table is a 'Content Header' section with a 'Record List' button. A search bar at the top right says 'Search this list...'. On the far right, there's a configuration panel titled 'Full' with sections for 'Object Name' (set to 'Cases'), 'Filter Name' (set to 'My Cases'), and 'Header Properties'. Under 'Header Properties', several options are checked: 'Allow list pinning', 'Show image icon', 'Show object name', 'Show refresh button' (which has a cursor over it), 'Show charts button', 'Show filter button', and 'Show display options'. There's also a 'Show All Options' dropdown.

Case Number	Contact Name	Subject	Status	Priority	Date/Time Opened
1 00001000	Rose Gonzalez	Starting generator after electrical failure	Closed	High	2/6/2023, 8:59 PM
2 00001001	Avi Green	Performance inadequate for second consecutive week	Closed	High	2/6/2023, 8:59 PM
3 00001002	Stella Pavlova	Seeking guidance on electrical wiring installation for GC5060	New	Low	2/6/2023, 8:59 PM
4 00001003	Babara Levy	Easy installation process	Closed	Low	2/6/2023, 8:59 PM
5 00001004	Babara Levy	Maintenance guidelines for generator unclear	Closed	Medium	2/6/2023, 8:59 PM
6 00001005	Josh Davis	Electrical circuit malfunctioning	Closed	Medium	2/6/2023, 8:59 PM
7 00001006	Edna Frank	Generator assembly instructions unclear	Closed	Low	2/6/2023, 8:59 PM
8 00001007	Tim Barr	Structural breakdown of rotor assembly	Closed	Medium	2/6/2023, 8:59 PM
9 00001008	Tim Barr	Customer service for portable generators needs beefing up	Closed	Low	2/6/2023, 8:59 PM

## Step 2: Creating New Page Layout



## Step 3: Adding Changes To Page Layout



## Step 4: Getting Contact for John Depp

The screenshot shows the Salesforce Contact page for 'Mr. Johnny Depp'. At the top, there's a navigation bar with links like Service, Home, Chatter, Accounts, Contacts, Cases, Reports, Dashboards, Knowledge, and a search bar. Below the header, the contact's information is displayed: Title (Mr.), Account Name (North America Portal Account), Phone (2), Email (vfz76386@zslsz.com), and Contact Owner (Butterfly). On the left, there are tabs for Related, Details, and News. The Related tab shows sections for Opportunities (0), Cases (0), Campaign History (0), and Notes & Attachments (0). On the right, there's an Activity section with a Chatter feed, a sidebar with options like Delete, View Contact Hierarchy, Clone, Change Owner, View Customer User, Disable Customer User, Log in to Experience as User, Log in to Experience as User (disabled), Check for New Data, and Printable View, and a section for Upcoming & Overdue activities.

## Step 5: Refund Not Updated

The screenshot shows the Salesforce Case page for 'Refund Not updated'. The top header includes a back arrow, a magnifying glass icon, and the case title. Below the header, there are fields for Priority (Medium), Status (New), and Case Number (00001026). The page is divided into DETAILS and RELATED sections. The DETAILS section contains fields for Subject (Refund Not updated), Description (Team - My refund status for previous cancellation did not get updated !!!!), Internal Comments, Case Number (00001026), Case Reason, Account Name (North America Portal Account), Contact Name (Johnny Depp), Date/Time Opened, Case Origin, Status (New), Priority (Medium), Contact Phone, and Contact Email. The RELATED section features a Chatter feed with a post from vfz76386 (Customer) created at Just now, containing the case number 00001026. It also includes Like, Comment, and Write a comment... buttons.

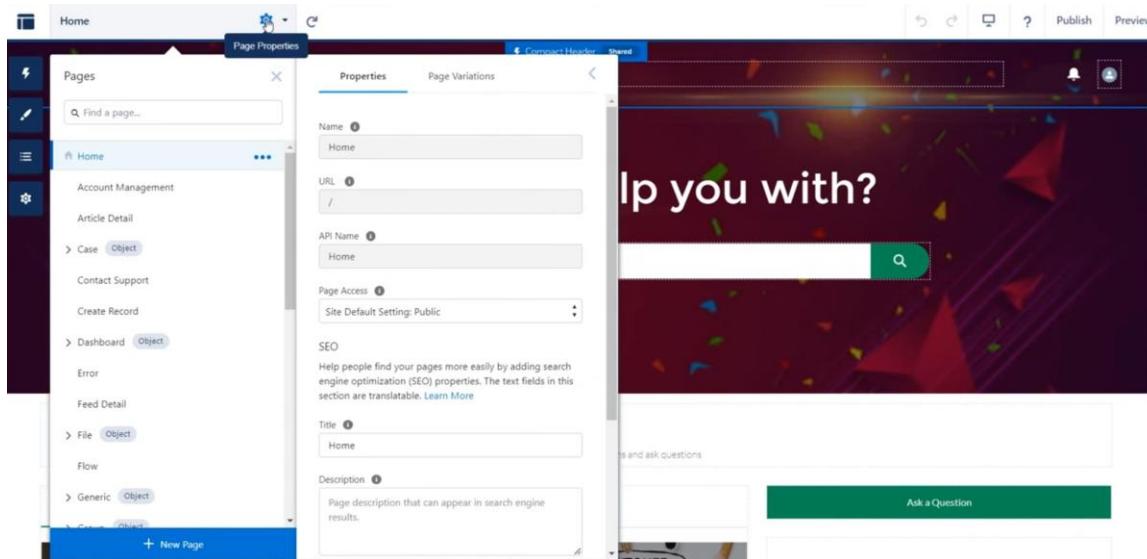
# Phase 9: Testing, QA & UAT

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Prepared by: Yaramala Varshitha

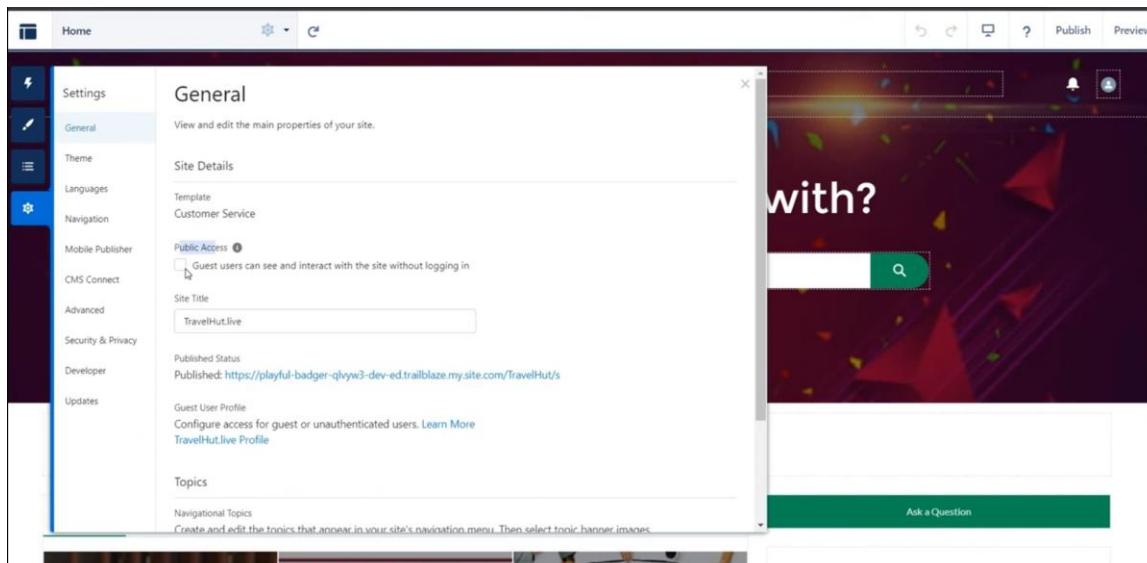
Phase 9 is dedicated to testing, quality assurance (QA), and user acceptance testing (UAT). This phase ensures that the Experience Cloud site is functioning correctly, meets requirements, and provides a secure, scalable, and user-friendly experience before final deployment.

## Step 1: Editing Page Properties



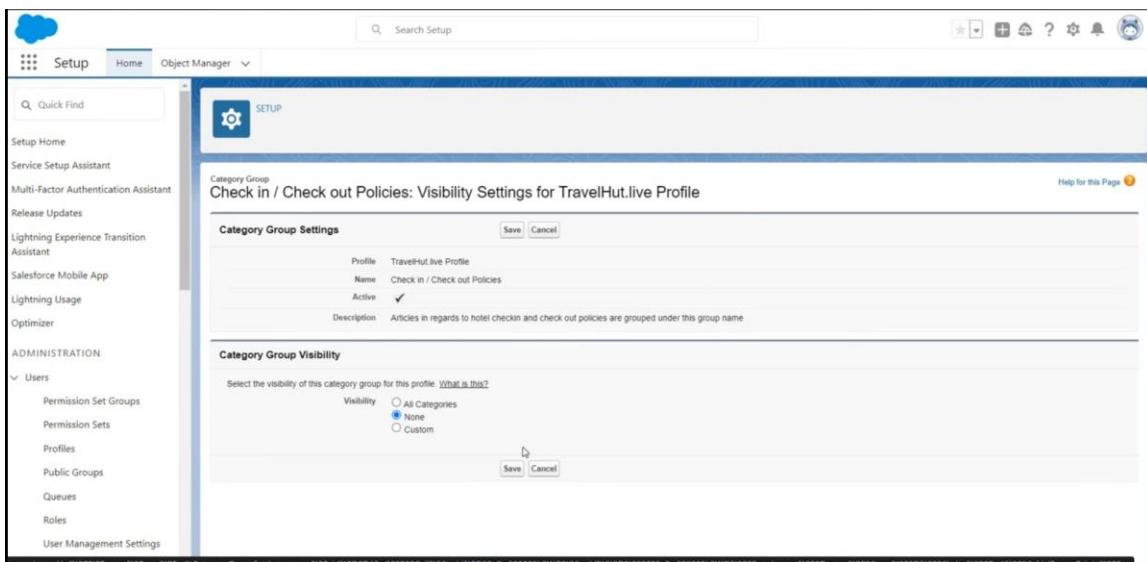
The screenshot shows the 'Page Properties' interface for the 'Home' page. The left sidebar lists various page types like Account Management, Article Detail, Case, Contact Support, Create Record, Dashboard, Error, Feed Detail, File, Flow, Generic, and a '+ New Page' button. The main panel displays the 'Properties' tab with fields for Name (Home), URL (/), API Name (Home), Page Access (Site Default Setting: Public), Title (Home), and Description (Page description that can appear in search engine results). To the right is a preview of the page content, which features a dark background with colorful geometric shapes and the text 'Ip you with?'.

## Step 2: Editing Public Access



The screenshot shows the 'General' tab under 'Settings'. The left sidebar includes options like General (selected), Theme, Languages, Navigation, Mobile Publisher, CMS Connect, Advanced, Security & Privacy, Developer, and Updates. The main panel shows the 'General' section with 'Site Details' (Template: Customer Service) and 'Public Access' (Guest users can see and interact with the site without logging in). It also displays the 'Site Title' (TravelHut.live), 'Published Status' (Published: https://playful-badger-qlvyw3-dev-ed.trailblaze.my.site.com/TravelHut/), and 'Guest User Profile' configuration. At the bottom, there's a 'Topics' section for managing navigation topics. To the right is a preview of the page content, which features a dark background with colorful geometric shapes and the text 'with?'.

## Step 3: Changing Visibility Settings



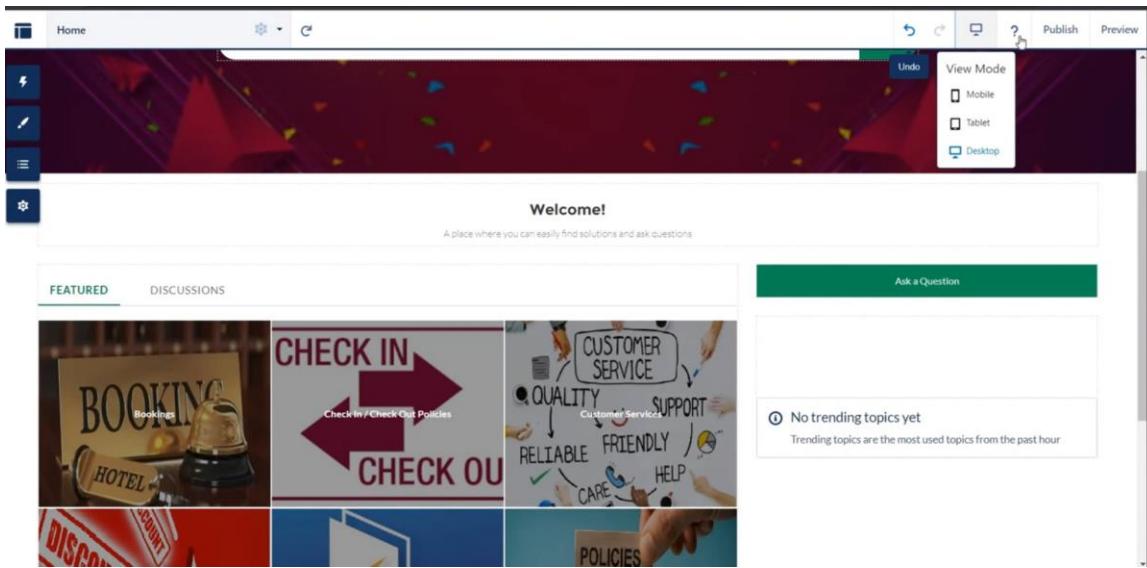
# Phase 10: Deployment & Maintenance

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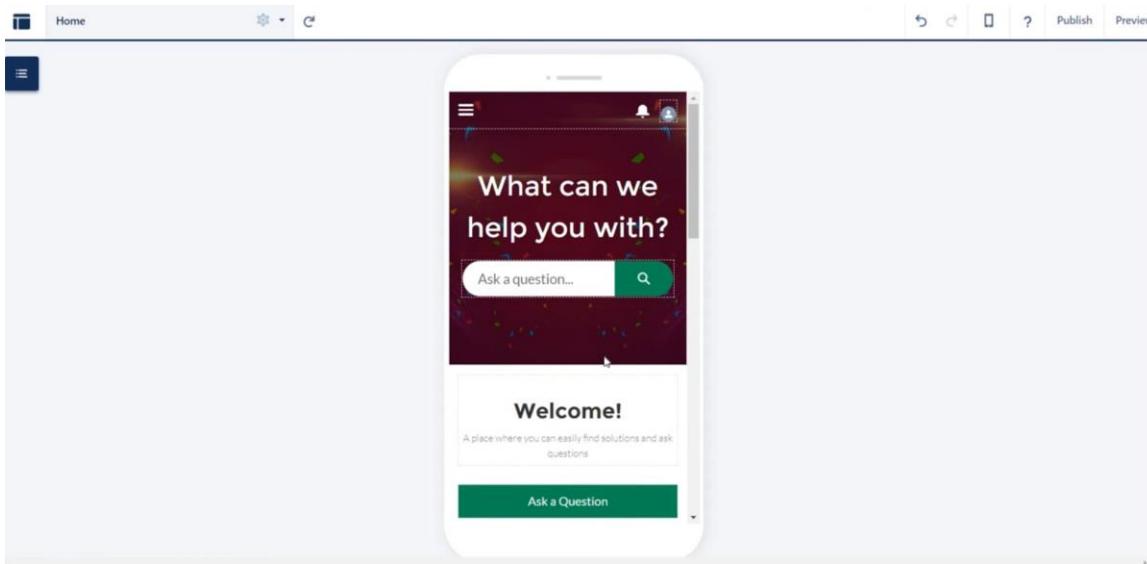
Prepared by: Yaramala Varshitha

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.

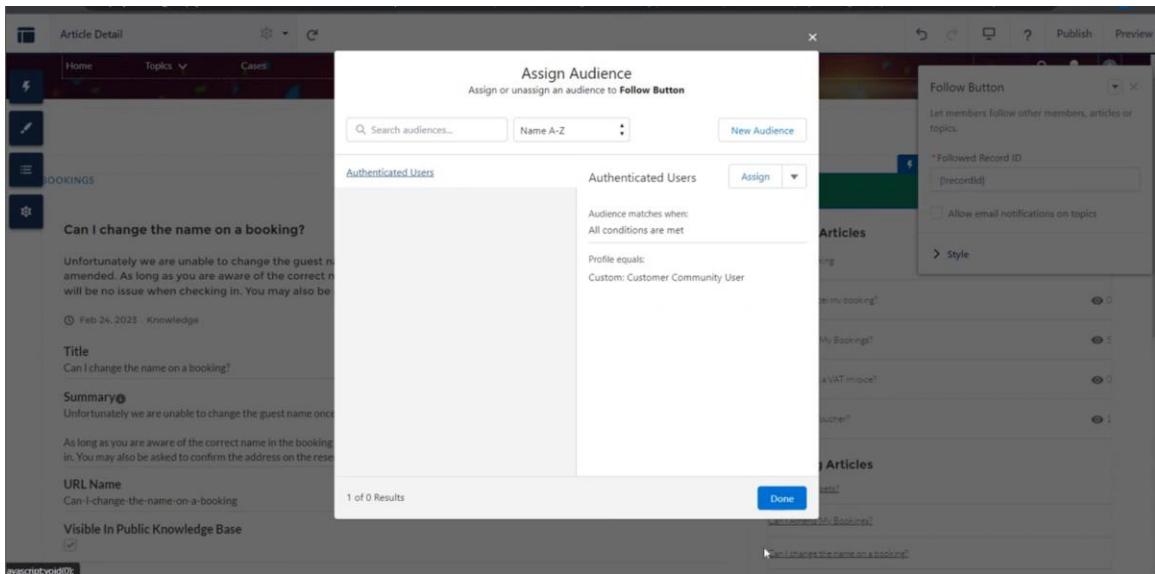
## Step 1: Mobile Access



## Step 2: successfully Created Mobile Access



## Step 3: assigning Audience for the Webpage



## Step 4: Successfully Created Page

