

# Terms and Conditions Design Document

## Org Setup

### Objects, Fields, and Records

This demo was built using a Developer Edition Salesforce org. The standard objects Account, Contact, Product, and User are used. And a custom field called “Accepted Terms” was created on the user object. This will be checked by the flow and updated upon accepting the terms. Additionally, a field set called “Self Registration” was added to the User object so that the “Company” field could be added to the standard Self Registration Form.

The image shows a Salesforce Self Registration form and its configuration panel. The form is titled "Self Registration" and includes the following fields:

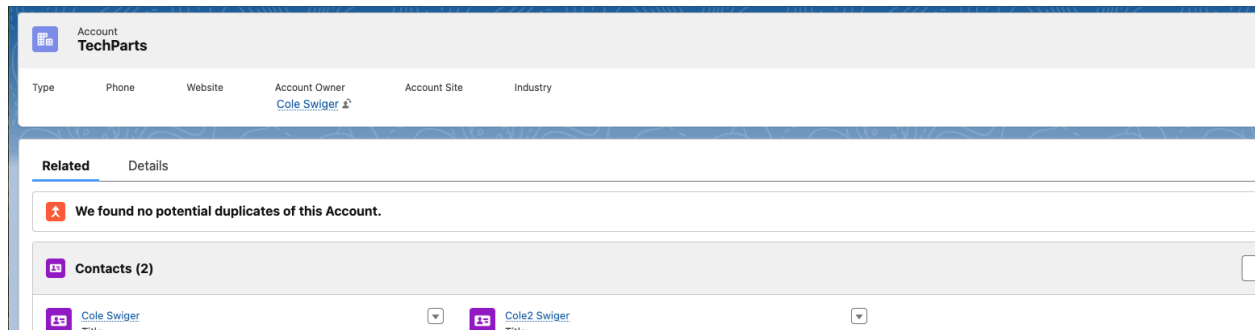
- First Name
- Last Name
- Email
- Company Name
- Create Password
- Confirm Password

Below the fields is a "Sign Up" button and a link "Already have an account?".

The configuration panel on the right lists the following settings:

- First Name Label
- Last Name Label
- Email Label
- Password Label
- Confirm Password Label
- Submit Button Label
- Cancel Link Label
- Include Password Field? (checked)
- Extra Fields Field Set Name: Self\_Registration
- Account ID
- Start URL
- Registration Confirmation URL: /CheckPasswordResetEmail

An Account called TechParts was created for users' contacts to be associated with when they self register on the site.



## Permissions

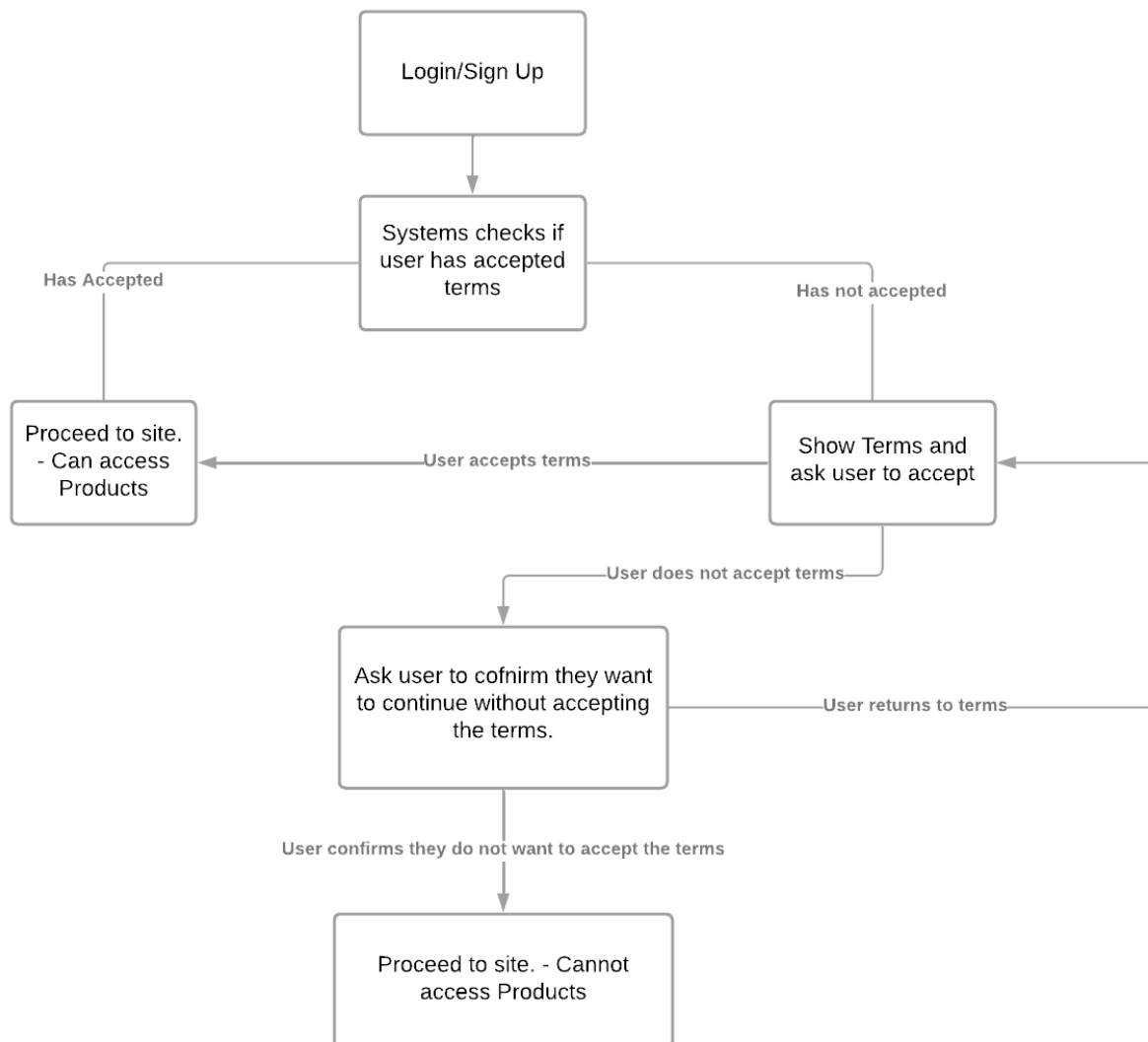
Guest users had to have the Guest User profile updated to allow them to view the navigation menu. Authorized users were given a profile called “TechParts Community User” based on the “Customer Community User” profile. They were also granted read access to Products. The Terms and Conditions Flow was also added to their profile so it will run when they log in.

A new page layout for Products called was assigned to this profile so that appropriate Product Details will be shown to users in the community when they click on a product.

## Flow Design

The Terms and Conditions are presented to the user as a Screen Flow. This flow is invoked as a login flow for the profile assigned to all site users. It is also embedded directly onto the Products page for any user who has not accepted the terms.

Below is a diagram of the flow and its steps. It first checks if the terms should be shown to the user, or if they can access the site immediately. If shown the terms, they can accept them, or reject them and access the site. The user will be warned if they do not accept the terms that their access will be limited. Upon accepting the terms, the “Accepted Terms” field on the user is checked, which works in conjunction with audiences to allow them to view Products on the site.



## Experience Site Setup

I used the Custom LWR Experience Site Template because of its flexibility. While I did not do any custom development for this demo, this template works well with custom LWCs that could be added later.

Administration settings were set up to allow users to self register using the site's default self-registration page. Users are created using the information they provide, and are assigned the profile created earlier and their contact assigned to the TechParts account. Audiences are used throughout the site to show/hide relevant information depending on the status of the user. These details are outlined for each page below.

## Login

This page allows existing users to log in. Logging in will prompt the login flow to run.

## Self Registration

This page asks users to fill out personal and company information so an account can be created for them to access the site. This will also prompt the login flow to run.

## Home

I kept this as a generic landing page prompting users to check out the Product Catalog.

## Product Listing

Contains the Product List View and the Terms and Conditions for users who have not accepted them. Audiences are used to show the appropriate components. Guest users and authenticated users who have not accepted the terms will not see the products, but will instead see a message asking them to accept the terms. Authenticated users will be able to accept the terms directly from this page. Guest users will need to login before accepting.

## Product Detail

Shows the details of the Product selected from the Product List View. You can only reach this page if you can see the Product Listing to begin with, but it uses audiences in the same way as the listing page just to be safe.

## About

This is a generic About page for TechParts to mimic an actual Experience Cloud site.