# \*\*Comprehensive Documentation for Traveler Portal Setup in Salesforce Experience Cloud\*\*

This documentation provides a \*\*step-by-step, detailed guide\*\* for setting up a \*\*Traveler Portal\*\* using \*\*Salesforce Experience Cloud (Community Cloud)\*\*. It covers everything from initial setup to advanced configurations, ensuring a fully functional portal for travelers.

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## \*\*1. Initial Setup & Digital Experience Configuration\*\*

### \*\*Step 1: Enable Digital Experience in Salesforce\*\*

1. Log in to \*\*Salesforce Setup\*\*.

2. In the \*\*Quick Find\*\* box, type \*\*"Digital Experiences"\*\* and select it.

3. Click on \*\*Settings\*\* inside the Digital Experiences menu.

4. \*\*Enable\*\* the Digital Experience by toggling the switch.

5. Click \*\*Save\*\*.

### \*\*Step 2: Verify Site Availability\*\*

- Ensure your Salesforce org has \*\*Experience Cloud licenses\*\* enabled.

- If not, contact Salesforce support or your admin to enable it.

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## \*\*2. Site Creation & Template Selection\*\*

### \*\*Step 1: Create a New Experience Site\*\*

1. Go back to \*\*Digital Experiences\*\* in Setup.

2. Click \*\*New\*\* to create a new Experience (Community).

3. Enter a \*\*Name\*\* (e.g., "Traveler Portal").

4. Select a \*\*Template\*\*:

- For a travel portal, \*\*"Build Your Own (LWR)"\*\* or \*\*"Customer Service"\*\* templates work well.

5. Click \*\*Create\*\*.

### \*\*Step 2: Launch the Experience Builder\*\*

1. After creation, click \*\*Builder\*\* to customize the portal.

2. The \*\*Experience Builder\*\* will open, allowing drag-and-drop customization.

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## \*\*3. Customizing UI & Branding\*\*

### \*\*Step 1: Upload a Custom Logo\*\*

1. In the \*\*Builder\*\*, go to \*\*Theme Settings\*\*.

2. Upload your company/travel logo.

3. Adjust the \*\*header and footer\*\* as needed.

### \*\*Step 2: Customize CSS (Optional)\*\*

1. Go to \*\*Theme → Advanced → CSS Editor\*\*.

2. To hide the default Salesforce logo, add:

```css

.forceCommunityThemeLogo .logoImage {

display: none;

}

```

3. Save changes.

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## \*\*4. User Setup & Permissions\*\*

### \*\*Step 1: Enable Knowledge Users\*\*

1. In \*\*Setup\*\*, search for \*\*"Users"\*\* in Quick Find.

2. Select the \*\*user account\*\* that will manage the portal.

3. Click \*\*Edit\*\*.

4. Check the \*\*"Knowledge User"\*\* checkbox.

5. Click \*\*Save\*\*.

### \*\*Step 2: Assign Community Licenses\*\*

1. Go to \*\*Setup → Users → Permission Sets\*\*.

2. Assign \*\*"Experience Cloud User"\*\* permission set to relevant users.

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## \*\*5. Knowledge Base Configuration\*\*

### \*\*Step 1: Enable Knowledge in Salesforce\*\*

1. In \*\*Setup\*\*, search for \*\*"Knowledge"\*\*.

2. Click \*\*Enable\*\*.

3. Select \*\*"Lightning Knowledge"\*\*.

4. Configure \*\*Article Types\*\* (e.g., "Travel Guide", "FAQ").

### \*\*Step 2: Create Knowledge Articles\*\*

1. From the \*\*App Launcher\*\*, open \*\*Knowledge\*\*.

2. Click \*\*New Article\*\*.

3. Fill in details (Title, Summary, Body).

4. Assign \*\*Data Categories\*\* (e.g., "Destinations", "Flights").

5. \*\*Publish\*\* the article.

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## \*\*6. Data Categories & Article Management\*\*

### \*\*Step 1: Set Up Data Categories\*\*

1. In \*\*Setup\*\*, search for \*\*"Data Category"\*\*.

2. Click \*\*New\*\* to create categories (e.g., "Europe", "Asia").

3. Assign articles to relevant categories.

### \*\*Step 2: Link Articles to the Portal\*\*

1. In the \*\*Experience Builder\*\*, add a \*\*Knowledge Component\*\*.

2. Configure it to display articles based on \*\*Data Categories\*\*.

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## \*\*7. Page Topics & Content Alignment\*\*

### \*\*Step 1: Organize Topics\*\*

1. In \*\*Setup\*\*, search for \*\*"Topics"\*\*.

2. Create topics like \*\*"Travel Tips"\*\*, \*\*"Bookings"\*\*, etc.

3. Assign topics to articles.

### \*\*Step 2: Feature Topics on the Portal\*\*

1. In \*\*Experience Builder\*\*, add a \*\*Featured Topics\*\* component.

2. Select topics to display.

3. Assign images to each topic.

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## \*\*8. Access Control & Guest User Settings\*\*

### \*\*Step 1: Configure Guest User Access\*\*

1. Go to \*\*Setup → Profiles\*\*.

2. Select \*\*"Guest User Profile"\*\*.

3. Under \*\*"Category Visibility"\*\*, set to \*\*"All Categories"\*\*.

4. Ensure \*\*"Read"\*\* access is enabled for Knowledge.

5. \*\*Disable\*\* access to \*\*"Case"\*\* (if not needed).

### \*\*Step 2: Make the Portal Public\*\*

1. In the \*\*Experience Builder\*\*, click the \*\*three dots (⋯)\*\* on the page.

2. Select \*\*Page Properties\*\*.

3. Set \*\*Access\*\* to \*\*"Public"\*\*.

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## \*\*9. Final Testing & Publishing\*\*

### \*\*Step 1: Preview the Portal\*\*

1. Click \*\*Preview\*\* in Experience Builder.

2. Test navigation, articles, and user access.

### \*\*Step 2: Publish the Portal\*\*

1. Click \*\*Publish\*\* in the top-right corner.

2. Share the portal URL with users.

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## \*\*10. Troubleshooting & Best Practices\*\*

### \*\*Common Issues & Fixes\*\*

| Issue | Solution |

|--------|------------|

| Articles not visible | Check Data Category assignments |

| Guest users can't see content | Verify Guest Profile permissions |

| Portal not loading | Clear cache or check CSS conflicts |

### \*\*Best Practices\*\*

✔ \*\*Mobile Optimization\*\* – Ensure responsive design.

✔ \*\*SEO-Friendly URLs\*\* – Customize page URLs.

✔ \*\*Analytics Setup\*\* – Track visitor behavior.

✔ \*\*Regular Updates\*\* – Keep content fresh.

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### \*\*Additional Resources\*\*

📹 \*\*YouTube Tutorial:\*\* [Traveler Portal Setup Guide](https://www.youtube.com/watch?v=CasCLiSyORw&list=PLQFXjdhnRRn9PwOBe3I7zDXTU16ine1qr)

This \*\*end-to-end guide\*\* ensures your \*\*Traveler Portal\*\* is fully functional, secure, and user-friendly. 🚀

Would you like any section expanded further?