



Salesforce Communities

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AGENDA

- Communities.
- Difference between portal and communities.
- Impact On Customer And Partner Portal Users.
- Community Licenses.
- Enabling Communities.
- Creating Communities.
- Customizing Communities.

What Are Communities?

- Salesforce communities are public or private branded spaces for employees, customers and partners to connect.

- Communities are a great way to share information and collaborate with people outside your company who are key to your business processes such as customers and partners.

- Interaction with a customer is like conversation with a friend ,reading a tweet, live chat, reading a post on facebook or even talking.

Difference between portal and communities

Features	Portals	Communities
Licenses	High volume portal user Gold Partner	Customer community Partner Community
Customization	Limited customisation	Pixel perfect customisation
Chatter	No Chatter	Chatter is included
Search	Sidebar search	Global search

Impact On Customer And Partner Portal Users

- Existing organizations continue to have full access and may continue to use their portals or transition to Communities.
- Existing Portal customers are not required to make changes in their environment and have the choice to provision Communities functionality at no additional cost.
- If organization is not already using portal, community is the only choice.
- Sales force is encouraging new customers to try communities.

Community Licenses

- Two main types of community licenses:
 1. Customer Community
 2. Partner Community
- The Customer Community license is similar to a High Volume Customer Portal license and is well-suited for business-to-customer communities with large numbers of external users.
- The Partner Community license is similar to a Gold Partner license and is well-suited for business-to-business communities such as a partner community.
- In addition to the new licenses, Communities supports all internal and portal licenses.

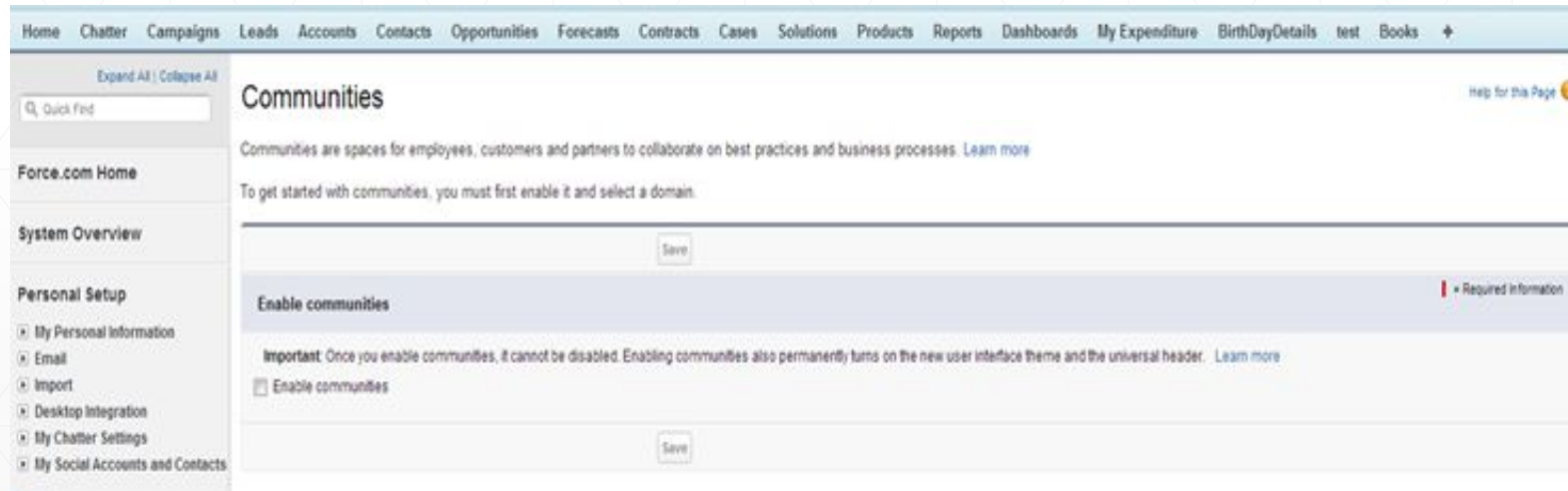
Enabling Communities

- Before you enable Communities:
 - Ensure that your organization has Communities licenses. From Setup, click **Company Profile > Company Information**. Your licenses are listed near the bottom of the page.

Partner Community	Active	5	0	5
Partner Community Login	Active	5	0	5
Customer Community	Active	5	1	4

Enabling Communities(Contd..)

- To get started with communities, we must first enable it and select a domain.
 - **From Setup, click Customize > Communities > Settings.**
 - **Select Enable Communities.**



Enabling Communities(Contd..)

- Specify the Domain name and once setup it will be used in all of your communities and it can't be changed after you save it.

You can designate a completely custom domain by entering it in on the Domain Management page. From Setup, click **Domain Management > Domains.**

Communities

[Help for this Page](#)

Communities are spaces for employees, customers and partners to collaborate on best practices and business processes. [Learn more](#)

To get started with communities, you must first enable it and select a domain.

Save

Enable communities

I = Required information

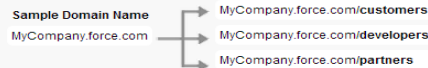
Important: Once you enable communities, it cannot be disabled. Enabling communities also permanently turns on the new user interface theme and the universal header. [Learn more](#)

Enable communities

Select a domain name

Important: The domain name will be used in all of your communities and can't be changed after you save it

Sample Community URLs



Domain name -developer-edition.ap1.force.com

Success! Domain name available

Save

Enabling Communities(Contd..)

- We will get below alert message for final confirmation to enable communities after giving unique community name and saved changes with given domain name.

Communities Help for this Page

Communities are spaces for employees, customers and partners to collaborate on best practices and business processes. [Learn more](#)

To get started with communities, you must first enable it and select a domain.

Enable communities = Required Information

Important: Once you enable communities, it cannot be disabled. Enabling communities also permanently turns on the new user interface theme and the universal header. [Learn more](#)

Enable communities

Select a domain name

Important: The domain name will be used in all of your communities.

Sample Domain Name

- MyCompany
- MyCompany
- MyCompany.force.com/partners

Domain name -developer-edition.ap1.force.com

✔ **Success!** Domain name available

The page at https://ap1.salesforce.com says:


Are you sure you want to enable communities and register your domain? Once you save your changes, this cannot be undone.

Creating Communities

- To start creating communities, click **Customize > Communities > All Communities**, then click **New Community**.

Manage Communities

[Feedback](#) | [Video Tutorial](#) | [Help for this Page](#) 

 Success! You can now create new communities.

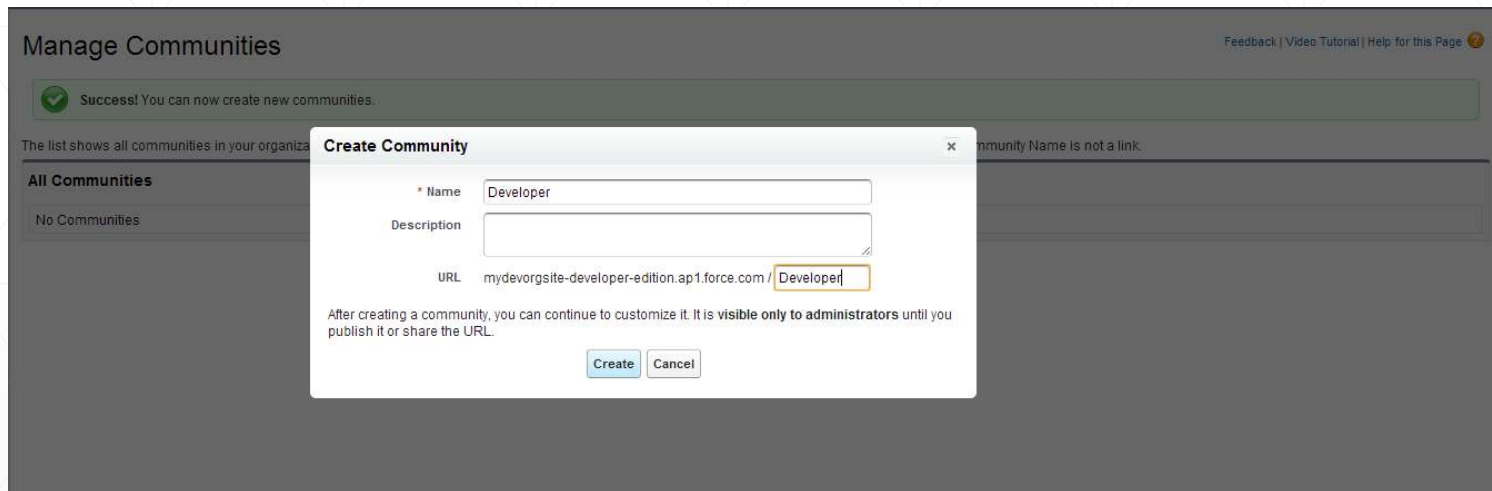
The list shows all communities in your organization. Clicking on the Community Name link takes you directly to the Community. If you're not a member, the Community Name is not a link.

All Communities New Community

No Communities

Creating Communities(Contd..)

1. Chose community template.
2. Enter a community name.
3. Enter a unique value at the end of the URL field.



The screenshot shows the 'Manage Communities' page with a 'Create Community' modal dialog open. The dialog contains the following fields and text:

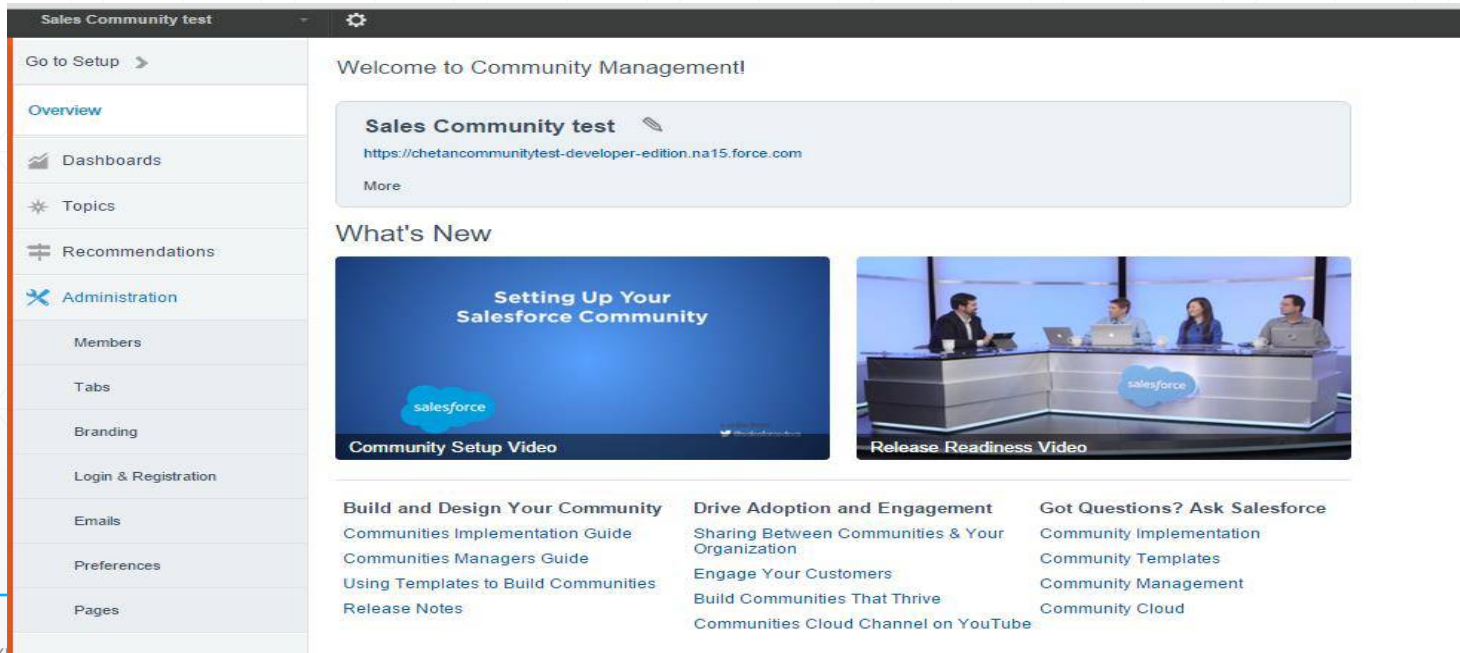
- Name:** Developer
- Description:** (Empty text area)
- URL:** mydevorgsite-developer-edition.ap1.force.com / Developer

Below the fields, there is a note: "After creating a community, you can continue to customize it. It is **visible only to administrators** until you publish it or share the URL." At the bottom of the dialog are 'Create' and 'Cancel' buttons.

- After creating a community, you can continue to customize it. It is **visible only to administrators** until you publish it or share the URL.

Customizing Communities

- To set up your community, you need to add members and select the tabs you want to display. To further customize and brand your community, go to Branding, Login Page and Emails tabs. Publish the community when it's ready to go live.



Customizing Communities(Contd..)

- **Adding Members to Your Community:-**

Once you add a profile or permission set, all users assigned to that profile or permission set become members of the community.

New users added to a profile or permission set that is already associated with a community automatically gain access.

Profiles and permission sets associated with communities can't be deleted from Salesforce. You must remove the profiles or permission sets from the communities first.

Customizing Communities(Contd..)

- **Manage community membership:-**
 1. Click Customize > Communities > All Communities, then click Manage next to the community name.
 2. Click Administration > Members.

Developer: Members

All users with the selected profiles OR permission sets are members.

Select Profiles

Search: for:

Available Profiles

- Contract
- Internal
- Portal
- Custom: Marketing Profile
- Custom: Sales Profile
- Custom: Support Profile
- Force.com - Free User
- M2O Account Manager
- M2O Marketing Communication
- M2O Sales Manager
- M2O Sales Operations
- Marketing User

Selected Profiles

- System Administrator

Select Permission Sets

Available Permission Sets

- Lead Permission set

Selected Permission Sets

- None--

(Optional) Share Community Before Publishing

Copy this link to share with stakeholders who need to see the community before you publish it.

Important The link only works for users with the selected profiles.

<https://mydevorgsite-developer-edition.ap1.force.com/Developer>

Customizing Communities(Contd..)

To add members using profiles:

- To filter profiles, select a profile type from the drop-down menu. To search for a specific profile, enter a search term and click **Find**. Search Results return profiles for the selected filter.
- Select the user profiles you want to allow access to your community. Press CTRL to select multiple profiles.
- Click Add. To remove a profile, select it and click Remove.

If you remove a profile from a community, users with that profile lose access to the community, unless the users are assigned permission sets or other profiles that are still part of the community. Their posts and comments still appear.

Customizing Communities(Contd..)

To add members using permission sets:


- To search for a specific permission set, enter a search term and click Find.
- Select the permission sets you want to allow access to your community. Press CTRL to select multiple permission sets.
- Click Add.
- Click Save.

If you remove a permission set from a community, users with that permission set lose access to the community, unless the users are associated with profiles or other permission sets that are still part of the community. Their posts and comments still ~~appear even after they lose access.~~

Customizing Communities(Contd..)

Create Communities Users:

- To allow an external user to access your community, you must enable the external user's contact record as a customer user or partner user, depending on their license type. Your community can contain users with Partner Community, Customer Community, and Customer Community Plus licenses.


chetan chavan changed Account Name from a blank value to Grand Hotels & Resorts Ltd.

Comment · Like · August 21, 2015 at 1:24 AM

[Opportunities \[0\]](#) |
 [Cases \[0\]](#) |
 [Open Activities \[0\]](#) |
 [Activity History \[0\]](#) |
 [Campaign History \[0\]](#) |
 [Notes & Attachments \[0\]](#) |
 [HTML Email Status \[0\]](#)

Contact Detail

[Edit](#) [Delete](#) [Clone](#) [Request Update](#) [Manage External User](#)

Contact Owner  chetan chavan [\[Change\]](#)

Name Mr. Chetan Chavan customer

Account Name [Grand Hotels & Resorts Ltd](#)

- View Customer User
- Disable Customer User
- Log in to Community as User

Customizing Communities(Contd..)

To create partner users:

- View the external account you want to create a user for.
- Create a new contact. Click **New Contact** from the Contacts related list. Fill in the appropriate details, then click **Save**.
- On the contact detail page, click **Manage External User**, then **Enable Partner User**.
- Edit the user record for this external user.
 - Select the Partner Community user license.
 - Select the appropriate profile. Remember that profiles give users access to tabs in your community, so be sure you choose a profile that has the appropriate tabs exposed.
 - Deselect Generate new password and notify user immediately so that users don't receive a password before the community is activated. When you activate the community, the user will receive a welcome email with their login information, as long as the Send welcome email option is selected for the community.
- Click Save

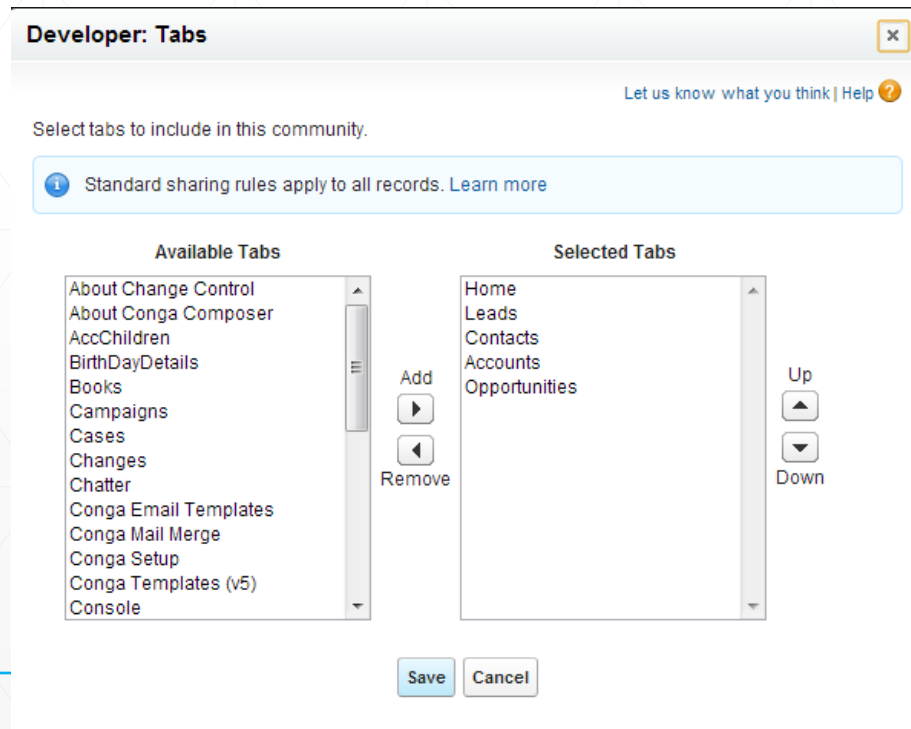
Customizing Communities(Contd..)

To create customer users:

- Create a new contact.
- On the contact detail page, click **Manage External User**, then **Enable Customer User**.
- Edit the user record for this external user.
 - Select the appropriate profile. The available profiles are limited to the Customer Community User profile and any profiles cloned from it.
 - Deselect **Generate new password and notify user immediately** so that users don't receive a password before the community is activated. When you activate the community, the user will receive a welcome email with their login information, as long as the [Send welcome email](#) option is selected for the community.
- Click **Save**.

Customizing Communities(Contd..)

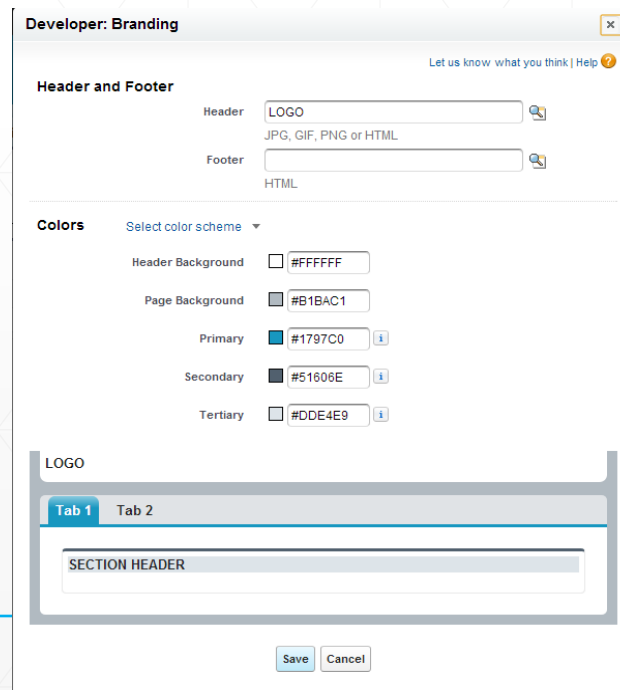
- Adding Tabs to Your Community:-**
 1. Click Customize > Communities > All Communities, then click Manage next to the community name.
 2. Click Administration > Tabs.



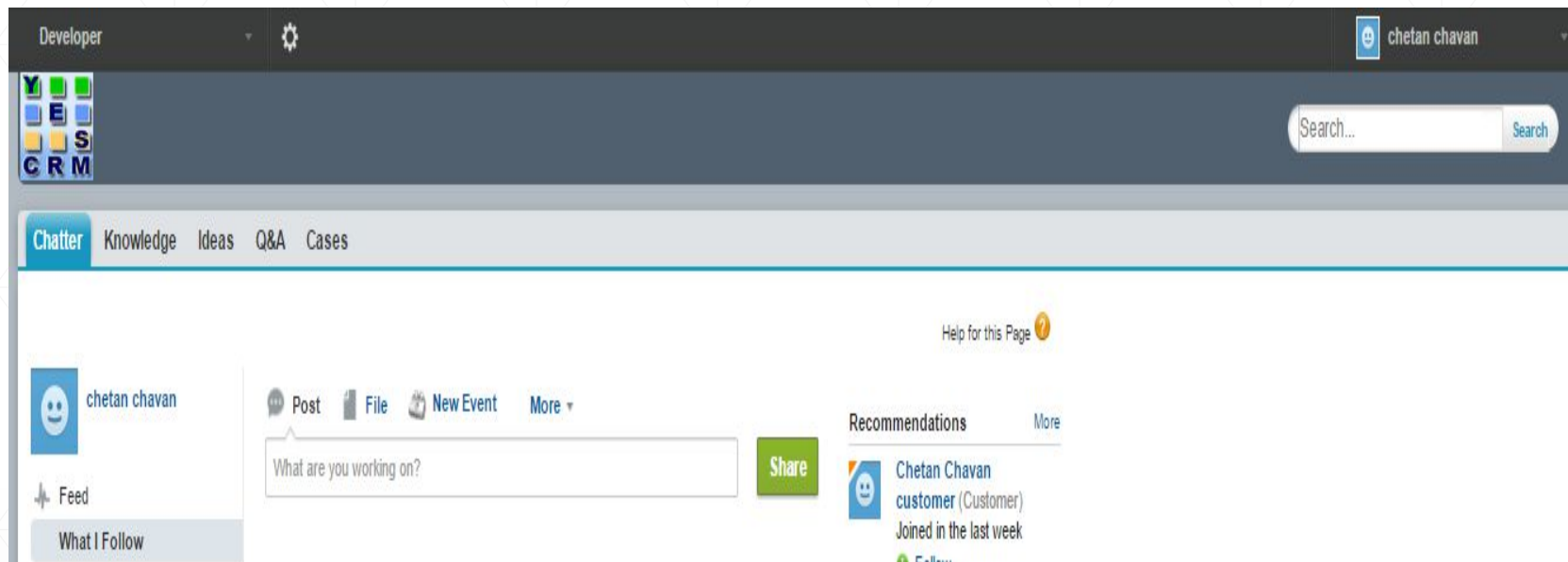
Customizing Communities(Contd..)

- **Branding Your Community**

1. Click Customize > Communities > All Communities, then click Manage next to the community name.
2. Click Branding.
3. Use the lookups to choose a header and footer for the community



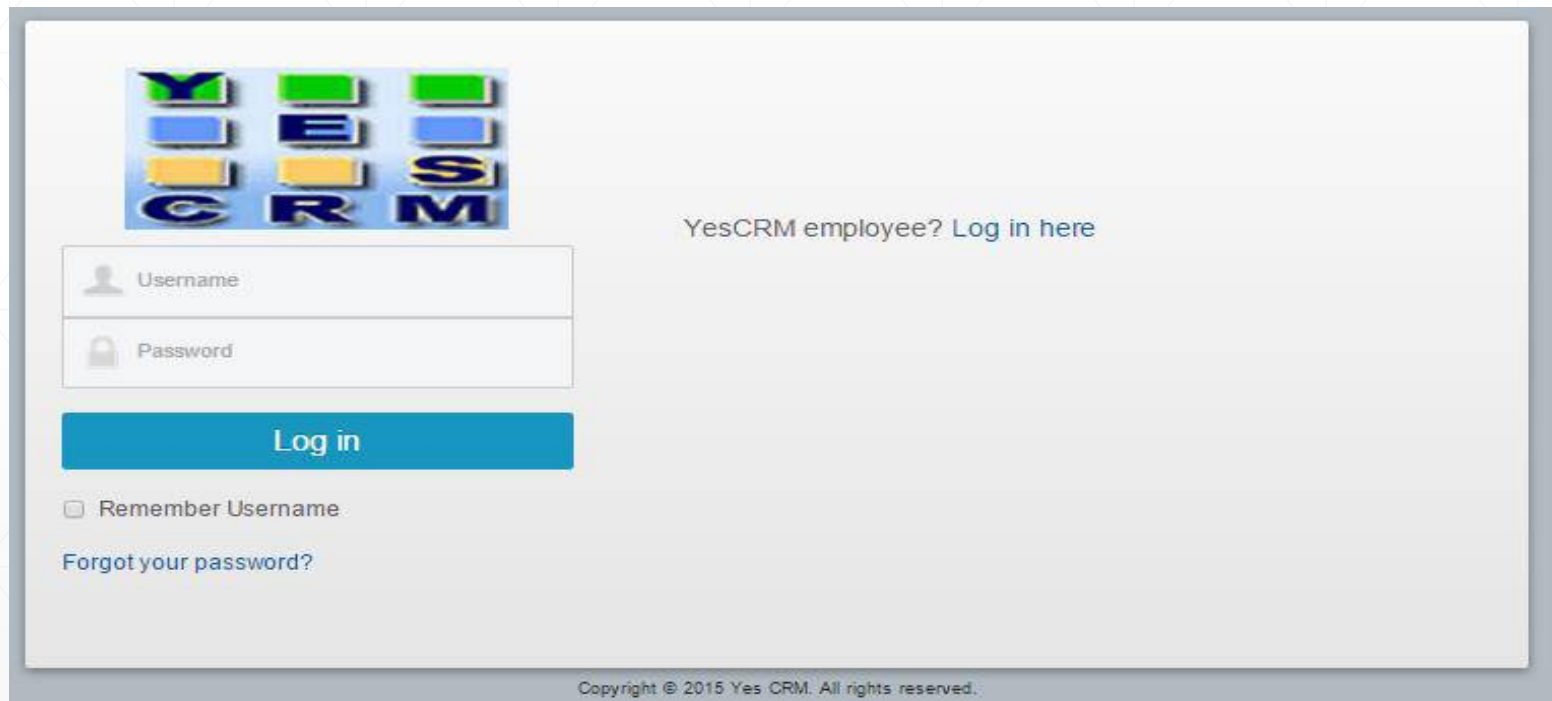
Customizing Communities(Contd..)

A screenshot of a community page interface. At the top, there is a dark header with 'Developer' on the left and a user profile 'chetan chavan' on the right. Below the header is a navigation bar with 'Chatter', 'Knowledge', 'Ideas', 'Q&A', and 'Cases'. A search bar is located on the right side of this bar. The main content area shows a user profile for 'chetan chavan' on the left, a post creation area with options for 'Post', 'File', 'New Event', and 'More', and a 'Share' button. To the right, there is a 'Recommendations' section showing a user 'Chetan Chavan customer (Customer)' who joined in the last week, with a 'Follow' button. A 'Help for this Page' link is also visible.

Customizing Communities(Contd..)

➤ Customizing Communities Login:-

1. Click Customize > Communities > All Communities, then click Manage next to the community name.
2. Click Login Page.


 The screenshot shows the YesCRM login interface. At the top left is the YesCRM logo. Below it are two input fields: 'Username' with a person icon and 'Password' with a lock icon. A blue 'Log in' button is positioned below the password field. Underneath the button is a checkbox labeled 'Remember Username' and a link for 'Forgot your password?'. On the right side of the login area, the text 'YesCRM employee? Log in here' is displayed. At the bottom of the page, a copyright notice reads 'Copyright © 2015 Yes CRM. All rights reserved.'

Customizing Communities(Contd..)

- **Setting Up Self-Registration for External Users**

Allow external users to self-register Salesforce provides a default Visualforce self-registration page.

Important: Self-registration is not functional until you customize both the default [self-registration page](#) and [controller](#).

If you enable self-registration for multiple communities, you must further customize the self-registration experience to direct users to different pages, assign different profiles or permission sets for different communities, and so on.

Customizing Communities(Contd..)

The screenshot shows a web browser window displaying a Salesforce Chatter community page. The address bar shows the URL: `https://chetandevc-developer-edition.ap2.force.com/developer/_ui/core/chatter/ui/ChatterPage`. The browser's address bar includes navigation icons and a star icon. Below the address bar, there are tabs for 'Apps', 'Bookmarks', 'Salesforce', and 'General'. The page header features a 'Developer' dropdown menu, a gear icon for settings, and a user profile for 'chetan chavan'. A search bar is located on the right side of the header.

The main content area is divided into several sections:

- Navigation:** A horizontal bar with tabs for 'Chatter', 'Knowledge', 'Ideas', 'Q&A', and 'Cases'.
- Help for this Page:** A small icon with a question mark.
- Post Creation:** A section with a 'Post' button, a 'File' icon, a 'New Event' icon, and a 'More' dropdown. Below this is a text input field containing 'What are you working on?' and a green 'Share' button.
- Recommendations:** A section titled 'Recommendations' with a 'More' link. It features a profile card for 'Chetan Chavan customer (Customer)' with the text 'Joined in the last week' and a '+ Follow' button.
- Trending Topics:** A section titled 'Trending Topics' with an 'All' link. It contains the text: 'Add topics to your posts to increase their visibility. Topics that have a spike in activity are likely to trend.'
- User Profile:** On the left, there is a profile card for 'chetan chavan' with a 'Feed' button and a 'What I Follow' section containing 'To Me', 'Bookmarked', 'People', 'Groups', 'Files', and 'Topics'.
- Post Content:** A post by 'chetan chavan' with the text 'How to test test 11?' and a date of 'August 21, 2015 at 2:09 AM'. Below the post are links for 'Comment', 'Like', and 'Share'.

Customizing Communities(Contd..)

- Customized self registration page for external users.

First Name	<input type="text"/>
Last Name	<input type="text"/>
Nickname	<input type="text"/>
Email	<input type="text"/>
Password	<input type="password"/>
Confirm Password	<input type="password"/>
<input type="submit" value="Submit"/>	

Customizing Communities(Contd..)

Customizing Communities Email:-

- 1. Click Customize > Communities > All Communities, then click Manage next to the community name.

- 2. Click Email. If a profile or permission set is part of multiple communities, users with that profile or permission set receive a welcome email from each community.

Customizing Communities(Contd..)

Sender

* From Name

* Email Address

Chatter Email Branding

Logo

150 x 50 pixels or less on a transparent background is best.

Footer Text

We strongly recommend including your company's physical address to comply with applicable anti-spam laws.

[Preview](#)

Email Templates

* Welcome New Member Send welcome email

Welcome emails are sent once the community is activated, and then whenever a member is added.

* Forgot Password

* Change Password

Case Comment

Additional Settings

- **Setting the Default Number of Community Roles:**
 - If your community is set up with Partner Community user licenses, you can limit the number of unused roles to improve performance. The limit is three roles; the system default is one.
 - For example, if three partner roles are currently created when an account is enabled for your community—Executive, Manager, and User—but you need only the User role for new accounts, you can reduce the number to one role. Click **Customize > Communities > Settings**.

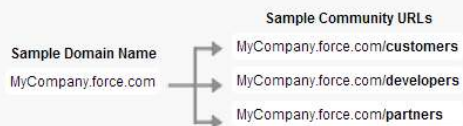
Additional Settings

Community Settings

Let us know what you think | [Help for this Page](#)

General Settings

The domain name for all Communities in your organization is **mydevorgsite-developer-edition.ap1.force.com**



Community Role and User Settings

Number of partner roles [i](#)

Enable Partner Super User Access [i](#)

[Save](#) [Cancel](#)

Sharing Settings for High-Volume Community Users


[New](#)

No sharing sets defined.

Sharing Tools

Tool	Description
Convert Community Member Access	Ensure that no records or folders owned by an internal user are shared with an external community member.

Publishing Communities

Sales Community test 

<https://chetancommunitytest-developer-edition.na15.force.com>

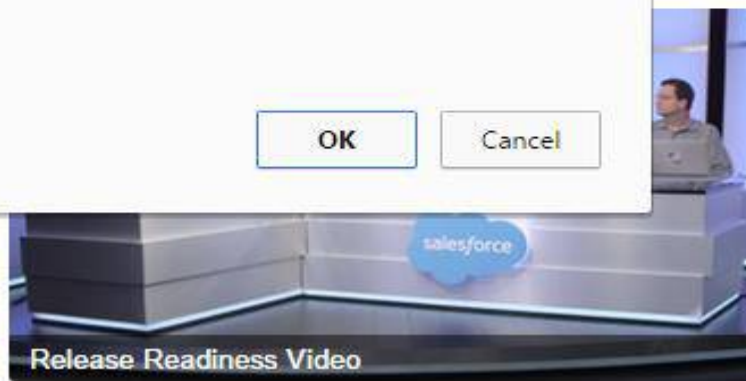
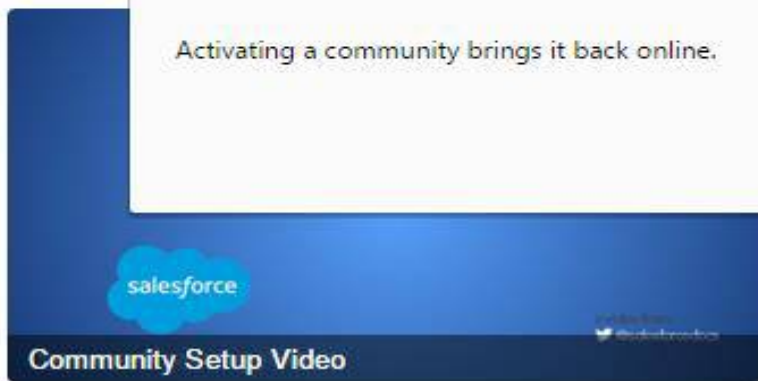
Less

Status	Inactive	<input type="button" value="Activate Community"/>
Template	Salesforce Tabs + Visualforce	<input type="button" value="Change Template"/>

What's

The page at <https://chetancommunitytest-developer-edition.na15.force.com> says: ✕

Activating a community brings it back online.





Thank you