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.**
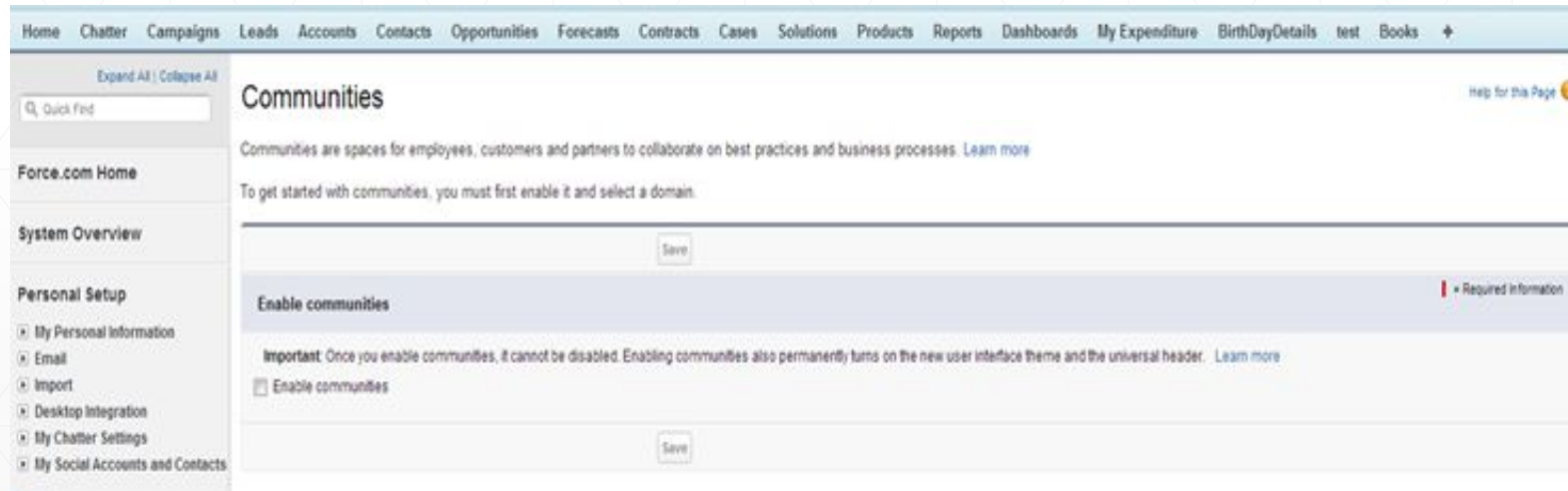
Enabling Communities(Contd..)

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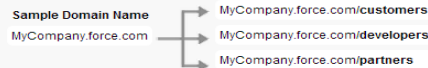
   You can designate a completely custom domain by entering it in on the Domain Management page. From Setup, click **Domain Management > Domains.**

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.

Creating Communities

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

Manage Communities

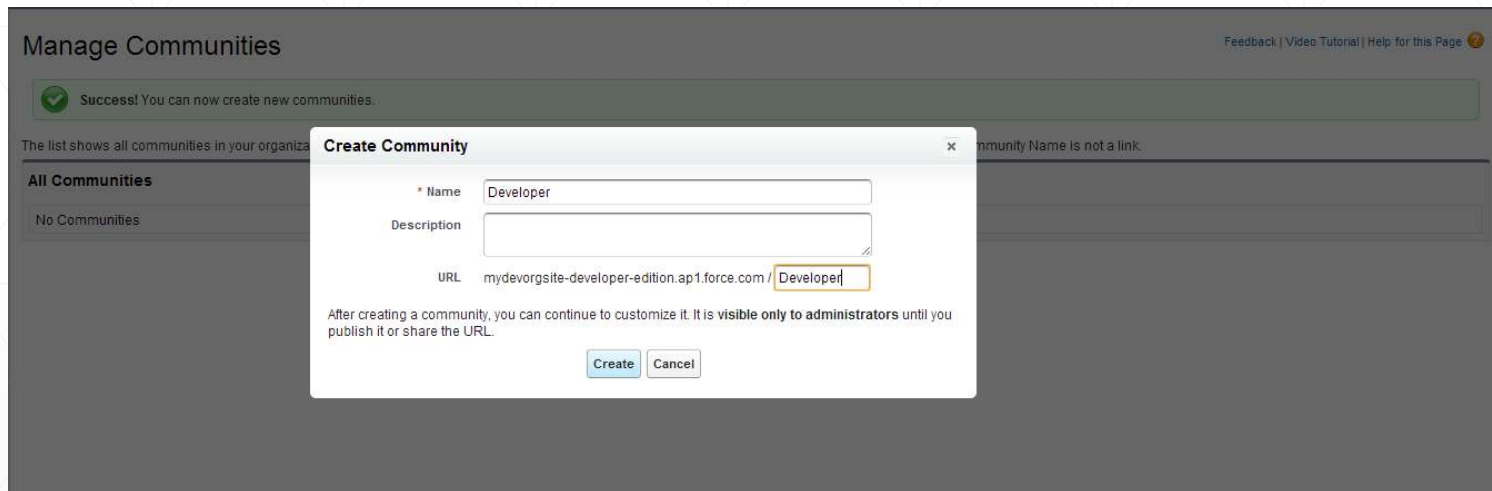✅ **Success!** You can now create new communities.

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.

- 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.
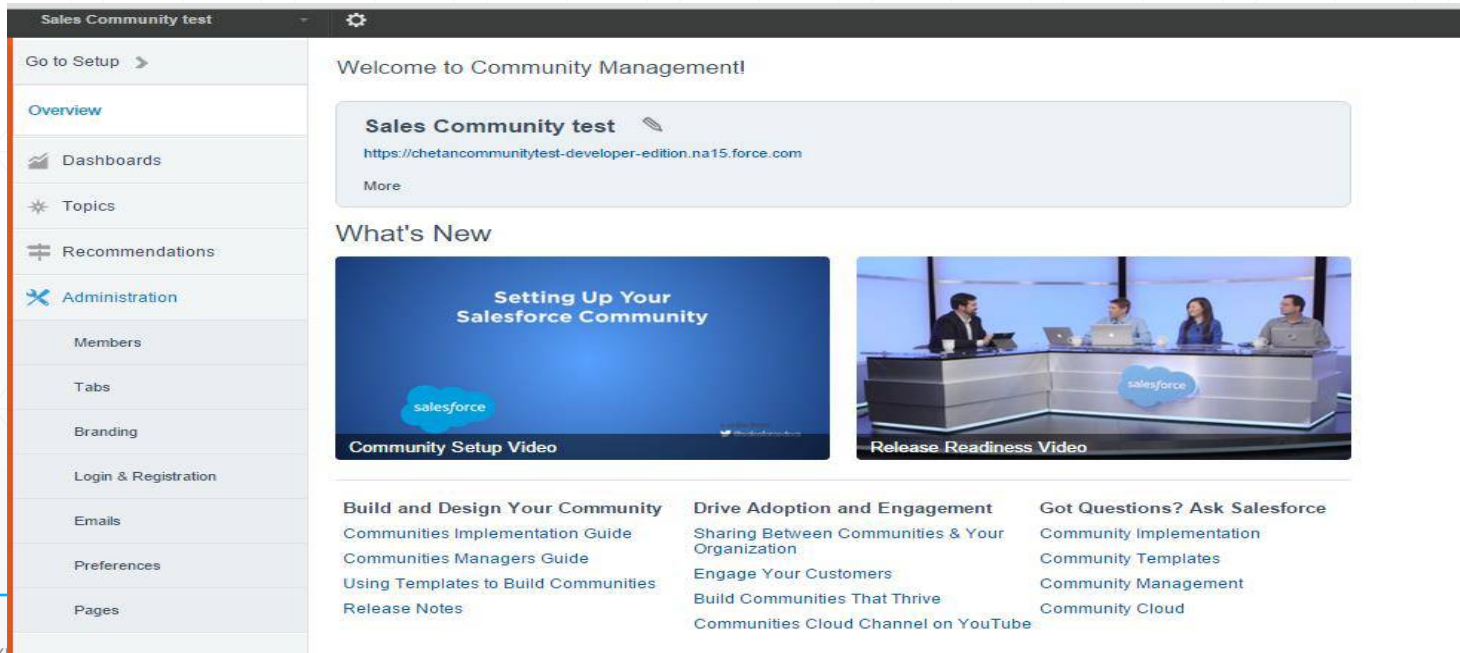
Customizing Communities(Contd..)

- **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.

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.

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.
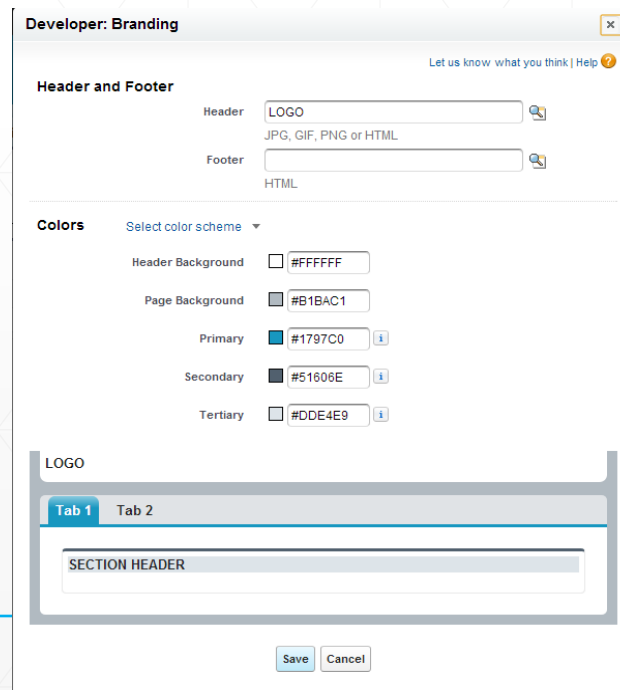
- Click Save

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.
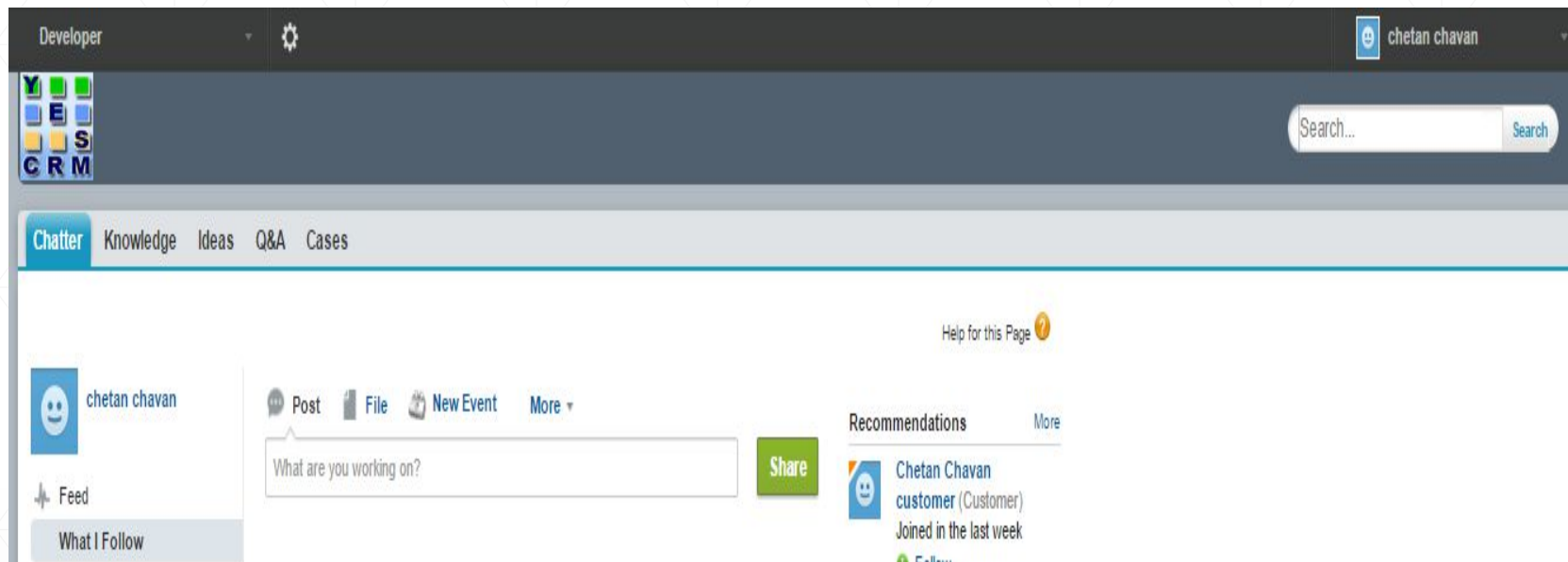2. Click Administration > Tabs.
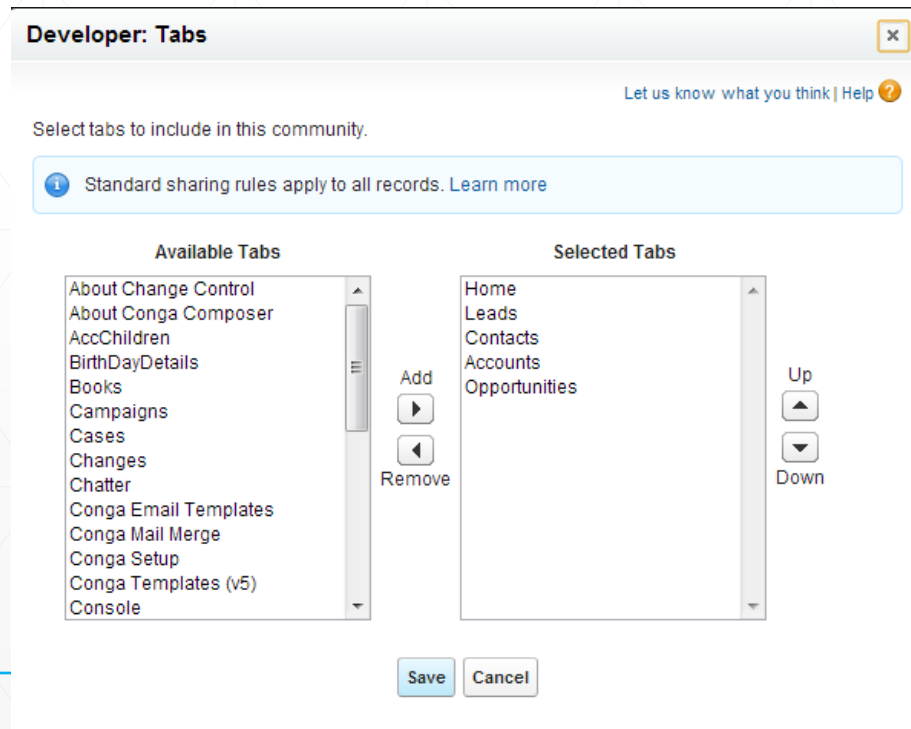
Customizing Communities(Contd..)

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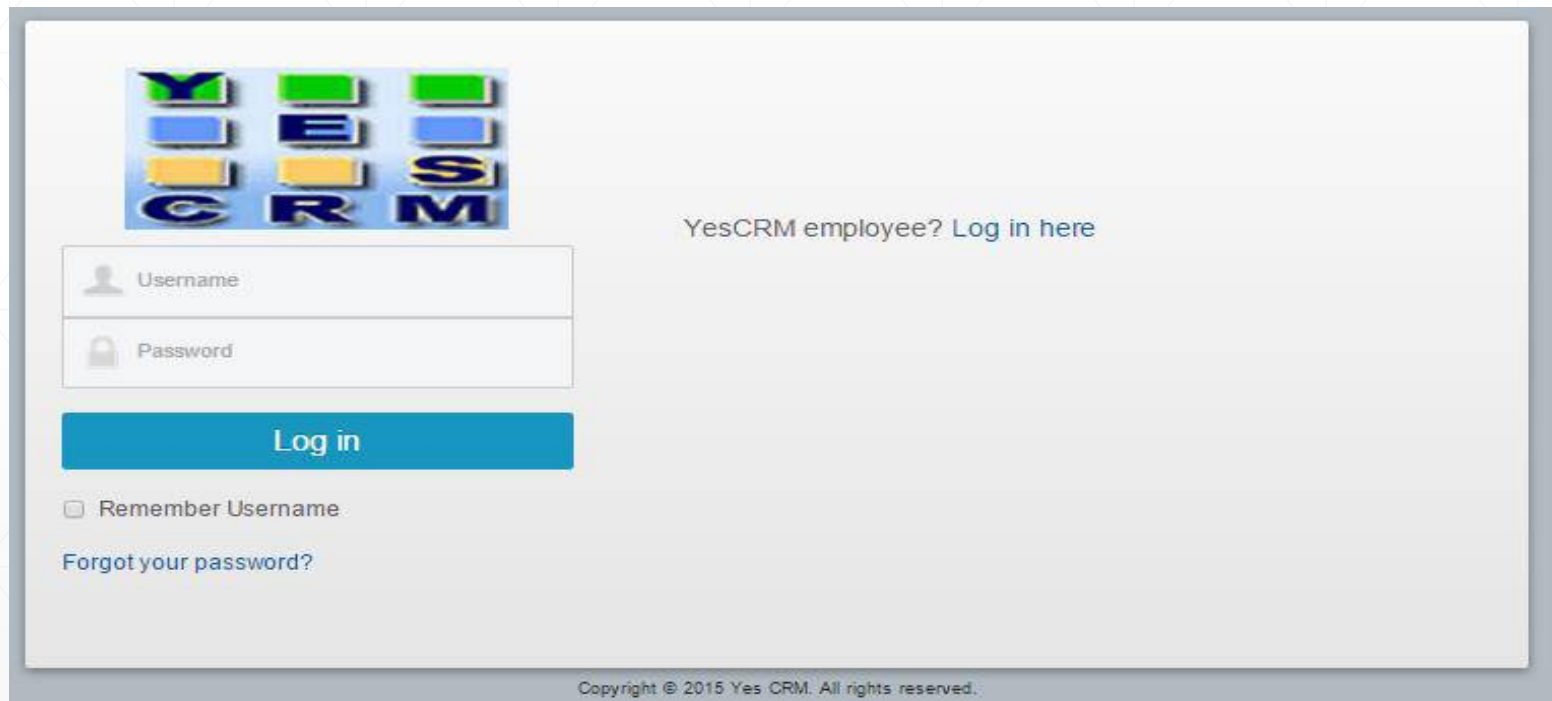 3. Use the lookups to choose a header and footer for the community

Customizing Communities(Contd..)

Customizing Communities(Contd..)

➢**Customizing Communities Login:-**
 1. Click Customize > Communities > All Communities, then click Manage next to the community name.
 2. Click Login Page.

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..)

Customizing Communities(Contd..)

- Customized self registration page for external users.

First Name	
Last Name	
Nickname	
Email	
Password	
Confirm Password	

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	Developer
* Email Address	chavan.chetan.b@gmail.com

Chatter Email Branding

Logo: Salesforce Chatter logo
150 x 50 pixels or less on a transparent background is best.

Footer Text: salesforce.com, inc. The Landmark @ One M
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
Communities: New Member Welcome Email
Welcome emails are sent once the community is activated, and then whenever a member is added.

* Forgot Password: Communities: Forgot Password Email

* Change Password: Communities: Changed Password Email

Case Comment:

Save Cancel

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.
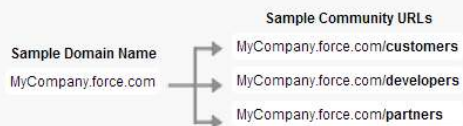 Click **Customize > Communities > Settings.**

Additional Settings

Community Settings

General Settings

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

Sample Community URLs

Sample Domain Name

MyCompany.force.com

→ MyCompany.force.com/**customers**

→ MyCompany.force.com/**developers**

→ MyCompany.force.com/**partners**

Community Role and User Settings

Number of partner roles   [3 ▼] [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.

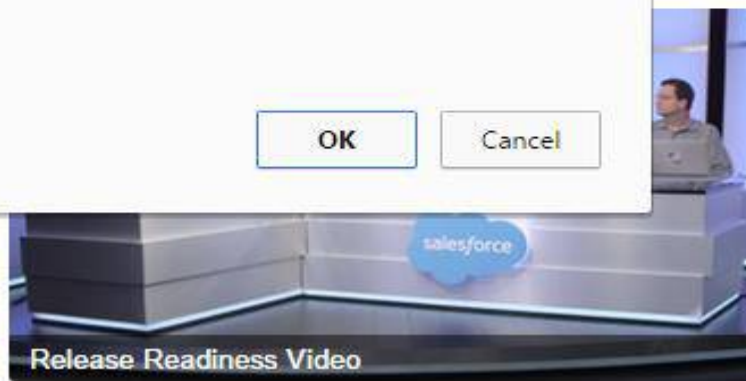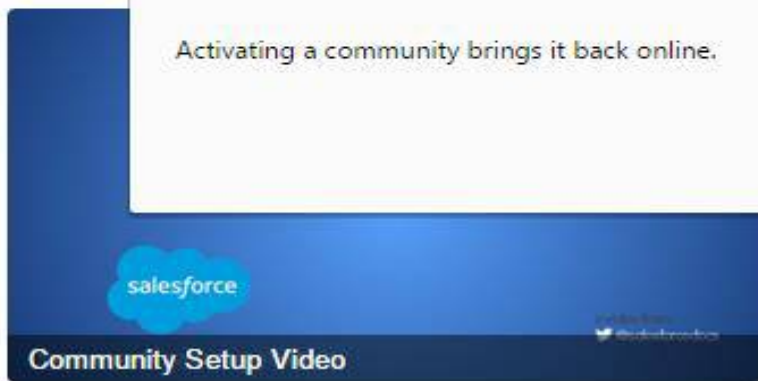# Publishing Communities

Thank you